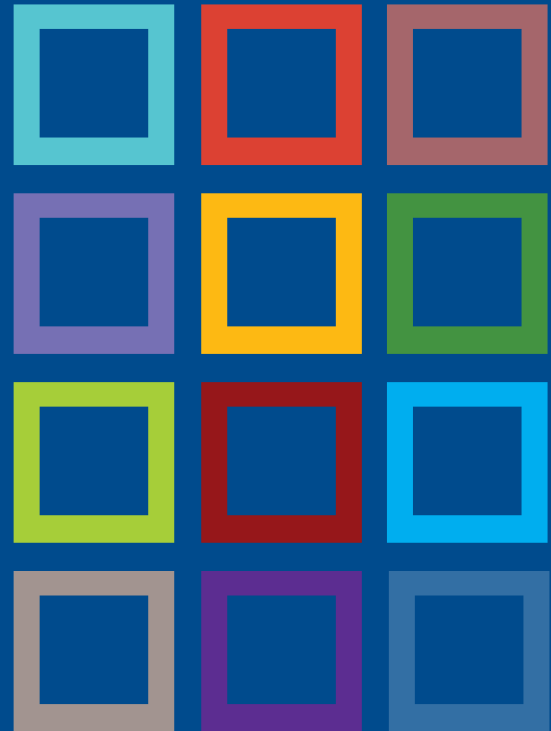




The Financial  
Services Forum

## Calendar of Events



January-March 2012

# Calendar of Events

## January – March 2012

January

February

March

Thursday 19 January

Direct Marketing

F A

### THE CHALLENGE OF OPENING UP CLOSED BOOKS

With up to 20 million customers currently invested in 'closed book' products, what opportunities exist to re-activate these people and earn their permission to cross-sell and up-sell new products? There are formidable obstacles to overcome; starting with the compliance risks of failing to maintain proper contact. To re-activate dormant or orphaned accounts, you must also comply with data protection and other regulation, satisfy intermediary partners and secure opt-in permissions. But once a segmentation of validated prospects has been achieved, what contact strategies could work and what could the prize be worth?

Tuesday 24 January

Life & Pensions

F

### GETTING READY FOR AUTO ENROLMENT

Starting in October 2012, new regulations will require every employer, regardless of size, not only to enrol the vast majority of their workforce into pension schemes, but also to make contributions on their behalf. The new 'Employer Duties' have profound implications for workplace engagement and financial literacy. Auto-enrolment is a massive marketing and communications challenge in itself, but also a fundamental game-changer for the long-term savings industry. Here is an opportunity to start getting your head around the next Very Big Thing.

masius  
brand ideas

Thursday 26 January

E-Commerce

F A

### THE 9 SERIAL KILLERS ON EVERY DIGITAL PROJECT

Has E-commerce outgrown Marketing? Where should it fit, and how do multiple internal stakeholders access it? This is one issue we address to unravel the complexities of managing digital projects. Whether a simple iPhone app or a major e-commerce investment, every digital project is under attack from nine serial killers - the inherent dangers that threaten digital delivery on time and to budget. These dangers kill project effectiveness, costing millions in time, resources and fees. Knowing the serial killers will keep you vigilant. Knowing how to prevent them preying on your projects will help you stay in control.

Tuesday 31 January

General

F A P

### WILL THE EU COOKIE DIRECTIVE CHANGE THE RULES OF ONLINE ENGAGEMENT ?

Cookies are used to analyse consumer browsing habits. But they can also be useful to consumers. Privacy groups have campaigned for greater regulation, and want to see users asked for consent every time a cookie is presented to them. Such multiple pop-ups would have a very disruptive effect on our browsing experience. The UK has agreed a one-year extension until May 2012 to comply with the EU Directive. But time is running out. What is the latest outlook for a resolution, and what will this mean for digital marketers?

Thursday 2 February

Retail Banking

F

### WILL RETAIL BANKING EVER BECOME MORE CUSTOMER-CENTRIC?

Banks have long been accused of putting their own interests ahead of their customers. A more customer-centric model, like Metro Bank, puts more emphasis on service as a key differentiator. But what will drive competitive advantage in retail banking in five years time? How important will it become to use customer data intelligently, and to the customer's advantage? What capabilities will be critical to successful marketing and multi-channel customer relationship management?

THUNDERHEAD  
Make sure you're heard

Wednesday 8 February

Asset Management

F

### IS THIS THE END FOR FUNDS MARKETING?

Pity the poor saver. With past performance clearly no guide to the future, growth prospects for all mainstream asset classes look decidedly weak. Many commentators predict a decade of negative real returns. What are the implications for traditional funds marketing, when long-equity alpha performance is so elusive and unpredictable? In the post RDR environment, will fund groups focus more on differentiating their institutional-style processes and credentials? What does this involve and how might it be done?

FWD PR MoneyMate  
Investment Data Management

Thursday 9 February

General

F A

### FAIR VALUE EXCHANGE: A TWO-WAY STREET

"Fair Value Exchange" is about balancing customer needs and corporate objectives. Can we excel at customer service, and still earn the right to make a legitimate profit? Too many financial products focus on price not value and fail to differentiate. Customers do not receive or perceive proper value, and product providers are not optimising their margin. Digital technology offers some solutions for smarter and more targeted proposition development and pricing strategies. Using FVE principles, profitability can be enhanced and key customer needs still satisfied.

SIMON • KUCHER & PARTNERS  
Strategy & Marketing Consultants

Tuesday 21 February

Private Banking & Wealth Management

F

### COMPELLING MESSAGES TO ACQUIRE AND RETAIN HIGH NET WORTH CLIENTS

For those working in marketing to support private bankers and wealth advisers, how do you create compelling, high trust messages that stand out and remain memorable with High Net Worth clients? How can Marketing influence new client acquisition? As well as support client relationship development and retention. And for those advising clients directly, what key psychological lessons can successfully influence client decisions and help you manage client relationships over the long term?

Thursday 23 February

General

F A P

### THE "HANDS ON" GUIDE TO SUCCESSFUL CUSTOMER ENGAGEMENT

What do we mean by customer engagement? For those close to the front line of customer relationships, it's about creating a strong emotional bond to the point where they become positively disposed to doing more business with you. How do you 'Surprise and Delight' your customers? Centralised marketing departments could do well to understand the five practical suggestions for not only reducing customer complaints, but also dramatically improving advocacy and cross-sales. We debate the possibilities with two major UK retail banks.

THUNDERHEAD  
Make sure you're heard

Tuesday 28 February

Mortgages

F

### LONDON MORTGAGES FORUM

Our Mortgages Special Interest Group comprises a community of the major lenders and leading distributor and broker networks, together with a number of professional services firms supporting the mortgages industry. The quarterly meetings of our Mortgages SIG are always well attended. We will debate a topical agenda, addressed by well-qualified speakers and panellists, on the day that coincides with the Mortgage Strategy Awards Dinner in London.

UNISYS  
ALL NEW MortgageBrain  
spicerhpart  
xit2

Thursday 1 March

General

F

### MEET ... MIKE TILDESLEY

The first in a new series of social events to re-ignite the Forum experience of networking with a group of your senior peers. Over an early evening drink we conduct an informal interview with a leading financial services marketer; in this case Mike Tildesley. Mike is The Financial Services Forum Marketer of The Decade, and Chairman of its Advisory Board. He has created and led a number of great financial services brands. We'll hear his views on what makes successful, and unsuccessful financial services marketing; some of the big changes he has seen in his career, and some of the ones he anticipates in the years ahead.

Tuesday 6 March

Corporate Communications

F

### THE SEARCH FOR GROWTH

As the Coalition approaches its 2nd birthday the central political concern is no longer how to reduce the budget deficit, but how to get the economy growing. Over successive quarters, the economy has registered only anaemic growth. How to break this trend is the great challenge facing Ministers and civil servants. We ask a senior former member of the Government; is the Government's growth plan working, is it cutting too far and too fast, where should the balance lie between fiscal and monetary stimulus, and can the Conservatives win the next election if growth stays this sluggish?

Thursday 22 March

General Insurance

F

### THE CONSUMER PURCHASING JOURNEY UNRAVELLED

Consumers are conducting research online before they buy, using multiple websites for information and advice. Pre-purchase touch points are key for insurance, where there is virtually no relationship post sale, and opportunities are missed if the pre-sale journey is not understood. We review research into consumer behaviour, and look at the technologies available to enhance the pre-sale experience and manage an increasingly complex journey with multiple touch points.



Tuesday 13 March

Employee Engagement & Communications

F

### ALIGNING YOUR PEOPLE WITH YOUR BRAND, FOR GOOD BUSINESS REASONS

Better employee engagement leads to better business performance. Few would argue with that assertion these days, yet financial services businesses, in particular, often seem resigned to defending their errant behaviour rather than inspiring and leading their employees to become passionate ambassadors for their brand. One business stands out from the crowd. VISA Europe has achieved consistent and outstanding employee engagement scores. But it doesn't happen by accident. It's the result of a five-year commitment addressing challenging objectives. We learn how they are getting on.

Thursday 15 March

General

F A

### MARKETING AUTOMATION UNLOCKS THE HOLY GRAIL OF B2B SALES AND MARKETING ALIGNMENT

A new breed of technology is opening up exciting opportunities for B2B marketers. 'Marketing Automation' captures your prospects' digital footprint to enable real-time lead scoring and event-triggered communications, empowering B2B marketers to take responsibility for the early stages of the sales pipeline in ways not previously possible. Using MA, Sales and Marketing will work together more efficiently. But the real prize is MA's ability to measure marketing effectiveness more powerfully than ever before. We debate the potential for MA in B2B and intermediated channels.

Tuesday 20 March

General

F A P

### ANNUAL MEMBERS' CONFERENCE

The first full-day Members' conference of 2012 will again be held at the BT Centre, with its state-of-the-art facilities. Save the date for this flagship event, which will include keynote presentations from both industry and marketing experts, plus a generous buffet lunch and excellent networking opportunities throughout the day, closing with a champagne reception. The event is free for all Members of The Financial Services Forum to attend.

BT

#### SCHEDULE KEY

#### F Event is open to Full Members

Full 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.

#### EVENT REGISTRATION

You can view additional details and reserve a place onto our events through our website [www.thefsforum.co.uk/events](http://www.thefsforum.co.uk/events). Alternatively, please contact Jenny Shierson on 020 7449 9036 or e-mail [js@thefsforum.co.uk](mailto:js@thefsforum.co.uk)



The Financial Services Forum

#### MEMBERSHIP BENEFITS

##### Special Interest Groups

We recognise that the financial services sector is not homogenous. So, to help Members address the specific challenges facing them in their sector, we have a number of Special Interest Groups – both discipline and sector specific. Special Interest Groups usually meet at least four times each year.

##### Networking

While the topic and speakers play a key part in our events, we know that networking is also important. Our seminars provide unparalleled networking opportunities with time allocated to meet your industry peers.

##### Knowledge Centre

The Financial Services Forum website provides a massive resource for financial marketers. The searchable database provides access to ten years of Forum presentations, over 500 *Argent* articles, research, advertising and marketing statistics, and other material. Visit [www.thefsforum.co.uk/knowledge](http://www.thefsforum.co.uk/knowledge)

##### Argent

*Argent*, the journal of The Financial Services Forum, is required reading for senior executives in financial services. It features thoughtful, informed articles written by leading academics, marketing practitioners and communications experts from around the world. Visit [www.thefsforum.co.uk/argent](http://www.thefsforum.co.uk/argent)

##### LinkedIn

You can now debate topical financial services marketing issues online on the Forum's LinkedIn Group. The community is free to join and encourages further discussion on topical agendas outside of the standard Forum calendar.

##### Twitter

You can also follow us on Twitter via [www.twitter.com/TheFSForum](http://www.twitter.com/TheFSForum)



Issue 38 of Argent will be printed in March 2012

## MEMBERSHIP COMMUNITIES

### F Full Members

Our Full Members are entitled to attend any of our scheduled events

### A Associate Members

Our Associate Members are entitled to attend the following events:

19 Jan	The Challenge of Opening Up Closed Books
26 Jan	The 9 Serial Killers on Every Digital Project
31 Jan	Will the EU Cookie Directive Change the Rules of Online Engagement?
9 Feb	Fair Value Exchange: A Two-Way Street
23 Feb	The “Hands On” Guide to Successful Customer Engagement
8 Mar	Do Different Kinds of Leader Build Different Kinds of Brand?
15 Mar	Marketing Automation Unlocks the Holy Grail of B2B Sales and Marketing Alignment
20 Mar	Annual Members’ Conference
29 Mar	The New Balance of Power

### P Practitioner Members

Our Practitioner Members are entitled to attend the following events:

31 Jan	Will the EU Cookie Directive Change the Rules of Online Engagement?
23 Feb	The “Hands On” Guide to Successful Customer Engagement
20 Mar	Annual Members’ Conference

## SPECIAL INTEREST GROUPS

### BY SECTOR

#### Asset Management

8 Feb Is this the End for Funds Marketing?

#### General Insurance

22 Mar The Consumer Purchasing Journey Unravelling

#### Corporate & Investment Banking

27 Mar A Day in the Life of a CFO

#### Life & Pensions

24 Jan Getting Ready for Auto Enrolment

#### Mortgages

28 Feb London Mortgages Forum

#### Private Banking and Wealth Management

21 Feb Compelling Messages to Acquire and Retain High Net Worth Clients

#### Retail Banking

2 Feb Will Retail Banking Ever Become More Customer-Centric?

### BY MARKETING DISCIPLINE

#### Brand Strategy

8 Mar Do Different Kinds of Leader Build Different Kinds of Brand?

#### Corporate Communications

6 Mar The Search for Growth

#### Direct Marketing

19 Jan The Challenge of Opening Up Closed Books

#### E-commerce

26 Jan The 9 Serial Killers on Every Digital Project

#### Employee Engagement & Communications

13 Mar Aligning Your People with Your Brand, for Good Business Reasons

#### General

31 Jan Will the EU Cookie Directive Change the Rules of Online Engagement?  
 9 Feb Fair Value Exchange: A Two-Way Street  
 23 Feb The “Hands On” Guide to Successful Customer Engagement  
 1 Mar Meet ... Mike Tildesley  
 15 Mar Marketing Automation Unlocks the Holy Grail of B2B Sales and Marketing Alignment  
 20 Mar Annual Members’ Conference  
 29 Mar The New Balance of Power

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MORE TH>N

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## Corporate partners

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## The Financial Services Forum

8a Utopia Village, 7 Chalcot Road, London NW1 8LH

T: 020 7449 9000 F: 020 7449 9009

E: info@thefsforum.co.uk W: www.thefsforum.co.uk