



The Financial
Services Forum

Calendar of Events
Sept – Dec 2009

Calendar of Events September – December 2009

September

Wednesday 9

E-commerce

M A

ADVANCED ONLINE CUSTOMER ACQUISITION

Performance-driven advertising is maturing - taking consumers through a browsing / research journey to online application and purchase. With measurability key to evaluating marketing effectiveness, the role of online DR advertising is growing again.

Sponsored by



14 - 16

Life & Pensions

M

EUROPEAN EXECUTIVE SUMMIT

The second Life & Pensions European Executive Summit, to be held at the Unisys International Management Centre in St Paul de Vence, France. Our agenda will cover the strategic drivers of change in the life & pensions industry. Through a series of presentations, workshops and exercises, we aim to help a group of senior executives work with each other to share ideas and focus on how their organisations can better plan and face the future. The Summit is free to attend, but strictly by invitation only.

Sponsored by



October

Tuesday 6

Direct Marketing

M A

THE AGE OF INFOMAGINATION

The fusion of information and imagination has been dubbed 'Infomagination' by Matt Sadler, winner of the 2009 Campaign President's Essay. Matt argues that marketing is becoming increasingly data-powered, but that clients and agencies must find ways of using data creatively, to add real utility to brand relationships. Richard Rawlinson, Partner with Booz & Co, looks at the practical obstacles facing large financial services providers trying to develop data-driven relationships with their customers, but concludes that The Prize is worth it.

Sponsored by



Thursday 8

Private Banking & Wealth Management

M

DELIVERING GLOBAL CONSISTENCY

We hear from HSBC Private Bank - who have re-launched as 'the world's private bank' and ask how they managed to leverage the broader retail brand but deliver the exclusivity of a global private bank. Working seamlessly across borders to deliver consistent advice, products and service, is a challenge only few can genuinely address.

Sponsored by



November

Tuesday 3

General

M A P

ANNUAL MEMBERS' CONFERENCE

The evolving brand landscape in financial services. Brand consolidation is now a major driver of change. New super-brands are emerging from the financial crisis as legacy brands are discarded. Yet, we are also seeing the launch of new service brands and new brands in key sectors. Expert speakers deliver insight and share their experiences on how financial services brands are evolving to reflect consumer attitudes and new market opportunities.

Sponsored by



Wednesday 4

E-commerce

M A

DEVELOPING CUSTOMER RELATIONSHIPS IN A MULTI-CHANNEL ENVIRONMENT

Allowing customers to interact with you when and where they please is one thing, guiding them to do business with you via the most efficient channel is another. Retaining and developing customers in a multi-channel environment has got a lot smarter, and there are lessons from overseas markets we are only just beginning to learn.

Sponsored by



November

Thursday 19

Life & Pensions

M

THE FUTURE OF INTERMEDIATED DISTRIBUTION

An in-depth review of the likely outcomes of the RDR. What is the future for independent financial advice, and are the number of IFAs really destined to fall? Is the industry now trending back towards controlled and tied distribution? Which is in the consumer's best interest?

Sponsored by



Tuesday 24

General

M A P

ANNUAL MEMBERS' DINNER

Our flagship black tie dinner at the ancient City of London Guildhall. With the presentation of the coveted prizes for our Awards for Marketing Effectiveness, including our Members' vote for Marketer of the Year.

Thursday 17

General

M A P

THE NEW RULES OF COMMUNICATION

Mid-way through a recession, how are consumers feeling? We update a survey into their current emotional psyche and discuss the implications for financial services providers. In such a fear-driven climate, what do you say in marketing communications to reflect consumers' current attitudes? When should you communicate? How often? How should your messages, your language and your tone of voice change to reflect today's radically different conditions? And, no less important, which of the assumptions that we all make about communication most urgently need to be discarded?



21 - 23

Retail Banking

M

EUROPEAN EXECUTIVE SUMMIT

The second Financial Services Forum European Executive Summit for Retail Banking, to be held at the Unisys International Management Centre in St Paul de Vence, France. Our agenda will cover the strategic drivers of change across the UK retail banking landscape. Through a series of presentations, workshops and exercises, we aim to help a group of senior executives work with each other to share ideas and focus on how their organisations can better plan and face the future. The Summit is free to attend, but strictly by invitation only.



Thursday 24

Corporate & Investment Banking

M

NEW MARCOMS STRUCTURES IN WHOLESALE BANKING

We release the results of our own survey into the current structures of Marketing and Communications departments across a number of wholesale and investment banks. Have structures become more centralised as a result of industry upheaval? Is re-structuring marketing and comms functions part of a cyclical trend? Is Marketing (including Brand and Advertising) related to Corporate Communications (including PR and Public Affairs), or are they best kept apart? Which model is most effective?



Tuesday 13

General

M A

MAKING THE CUSTOMER EXPERIENCE COUNT

Making the customer experience really count is a critical success factor. How do we identify the experience points that matter most? Should customers love us more or hate us less? Which brands are doing it well? Is optimising the customer experience a brand issue? Or is it simply 'doing good business'? How can we measure effective delivery of the brand experience?



Wednesday 14

Corporate Communications

M

GETTING READY FOR A NEW GOVERNMENT

By mid October there may even be a new Government. But even if a General Election is deferred until June 2010, the financial services industry can anticipate some changes in its relationships and dealings with Government. Fresh from the party conferences, our panel of public affairs experts and commentators will update us on the main themes coming out of the conference season and look ahead to the opportunities and threats presented by a fresh regime in Downing Street, Parliament and Whitehall.



Thursday 15

General

M A

B2B MARKETING BEST PRACTICE

A masterclass for all those involved in B2B and intermediated marketing, across a variety of financial services sectors. Some classic case studies and expert practitioners demonstrate that creativity is more important than ever to win cut-through in cluttered B2B markets. But technology and new media channels make B2B marketing more sophisticated. Getting results and better value from limited marketing budgets is a constant.



Friday 6

General

M

OPPORTUNITIES AND THREATS FACING THE SURVIVING MUTUALS

A special opportunity to engage in a strategic debate around the role of mutuals in the banking sector, following the FSA's stress tests into the sustainability of their current business models.



Wednesday 11

General

M A

FINANCIAL CAPABILITY

We invite several leading financial services retailers to "showcase" what they do to encourage Financial Capability, and why they do it. A panel discussion comprising senior thought leaders and practitioners in this field then follows. We debate the Financial Capability agenda, and challenge its purpose and likely effectiveness.



Thursday 12

HR & Internal Communications

M

THE ROLE OF PERSONAL IMPACT AND BRANDING

In the current environment of headcount reductions and restructuring, it's more important than ever to be on message and to build your personal profile. So, while we carefully manage our corporate brands, what about ourselves? Would you rate yourself as trustworthy, up to date and likely to be recommended? What do other people say about you? Maybe it's time to look in the mirror and take control of that brand called 'me'.

Thursday 26

Asset Management

M

THE CORPORATE PENSIONS MODEL IS BROKEN

The Corporate Pensions model is broken. DB pension funds are now horribly underfunded. DC funds are woefully inadequate. Does this fundamental instability make pensions an unattractive client base in future? Or are new developments in corporate pensions (such as Buyouts, Corporate Wraps and Fiduciary Management) going to help rescue the situation?

Tuesday 1

Insurance

M

THE FUTURE OF CREDITOR INSURANCE

Will the creditor insurance market exist after the Competition Commission rulings earlier this year - separating the sale of credit from the sale of income protection insurance? With rising unemployment during the recession, income protection premiums have rocketed. Is this over-pricing the product just when consumers need it most? We look at creditor insurance from the consumer, manufacturer and distributor perspectives and stimulate an open panel debate.



Thursday 3

Corporate Communications

M

REPUTATION MANAGEMENT IN THE DIGITAL AGE

Twitter is the latest digital channel to gain favour in the PR industry, feeding sound-bites to hard-pressed journalists. But the explosion of social media poses some problems. Brands and reputations are no longer controlled by centralised, top-down communication - bloggers and tweeters can rebuke or endorse brands at will. And their views gain momentum and enormous reach via the power of internet search, to make traditional media channels, and even traditional journalists, powerless by comparison.

December

Tuesday 29

Insurance

M

LOYALTY AND RETENTION ARE OXYMORONS

Churn rates continue to increase as consumers are encouraged to shop around and switch providers for their general insurance. What can insurers do to restore profitable customer relationships?

Which loyalty-building techniques actually work? Do insurers focus enough on the 'tipping point' of retention – when the customer makes a claim? Can they use claims experience as a service differentiator? And how do different acquisition channels influence retention?



Wednesday 30

Asset Management

M

SALES GOES SOFT

In the old days Sales was a hard art for macho "Hunters" who bashed down doors to push their products. Now the financial crisis has accelerated an existing trend towards a softer, more female "Gatherer" approach; more about listening and empathy with clients, with more emphasis on retention and CRM. What are the skills needed in the new world of selling? How can existing sales teams be retrained? How should these new sales teams be structured?

Tuesday 20

Direct Marketing

M A

TRANSACTIONAL MARKETING

Transpromo is the use of scheduled transactional communications like policies or statements, to drive revenue via cross-sell and up-sell offers to existing customers. But it can also be used to educate customers, deliver added-value service and regulatory announcements: effectively enhancing the customer experience for little or no extra cost - regular transactional communications are embedded in the cost of doing business. Creative uses of Transpromo can result in increased revenue and improved customer retention.



Thursday 22

General

M A P

THE TRUE VALUE OF BRANDS

What is the role of a 'brand' today, and does it really influence consumer choice? We learn about the impact of brands on consumer behaviour, with examples from packaged goods as well as financial services markets – to determine the similarities and differences. And we look in depth at the proven techniques for measuring brand impact that help to quantify the benefit of brand advertising in an integrated campaign mix to optimise overall return on marketing investment.



Tuesday 17

Corporate & Investment Banking

M

REPAIRING TATTERED REPUTATIONS

Tattered reputations across the wholesale banking industry have changed the landscape dramatically – who are the winners & losers? What are the opportunities for the global investment banks to re-define and differentiate themselves, and what will their new positionings look like? Updated reputation research from the FT, and the appearance of new brand advertising campaigns could herald a new world order.

Wednesday 18

Mortgages

M

LONDON MORTGAGES FORUM

The UK mortgages environment is changing dramatically and quickly. And the FSA is deliberating on new codes of mortgages regulation. Leading lenders and intermediary distributors will come together at this London Forum to debate the latest developments.



Tuesday 8

General

M A P

CONSUMER BEHAVIOUR IN RECESSION

The official recession, one year on. We reveal insights into changing consumer attitudes and behaviour across a range of market categories. How are consumers dealing with recession? What opportunities does the recessionary mood present for financial services providers? Digital marketing case studies bring the story to life.



Thursday 10

Private Banking & Wealth Management

M

NOT ALL BOUTIQUES ARE THE SAME

What are the factors driving the growth of so-called boutique wealth managers? Personal relationships, bespoke service, the ownership model? We create a panel of wealth advisers, including a small start-up, a growing UK network and a mid-tier private bank. How do they compete with the processes and resources of the global private banks and can they differentiate themselves within the 'boutique' sector? What are HNW clients looking for, and how do they define whether a boutique is relevant for them?



SCHEDULE KEY

- M 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. Alternatively, please contact Victoria Monk on 020 7449 9027 or e-mail vm@thefsforum.co.uk

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 eight years of Forum presentations, over 500 Argent articles, research, advertising and marketing statistics, and other material. Visit 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

F Full Members

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

A Associate Members

Our Associate Members are invited to attend the following events:

3 September	Advanced Online Customer Acquisition
17 September	The New Rules of Communication
6 October	The Age of Infomagination
15 October	B2B Marketing Best Practice
20 October	Transactional Marketing
22 October	The True Value of Brands
3 November	Annual Members' Conference
4 November	Developing Customer Relationships in a Multi-Channel Environment
11 November	Financial Capability
24 November	Annual Members' Dinner
8 December	Consumer Behaviour in Recession

P Practitioner Members

Our Practitioner Members are invited to attend the following events:

17 September	The New Rules of Communication
22 October	The True Value of Brands
3 November	Annual Members' Conference
24 November	Annual Members' Dinner
8 December	Consumer Behaviour in Recession

SPECIAL INTEREST GROUPS

BY SECTOR

Asset Management

30 September	Sales Goes Soft
26 November	The Corporate Pensions Model is Broken

Corporate & Investment Banking

24 September	New Marcoms Structures in Wholesale Banking
17 November	Repairing Tattered Reputations

Insurance

29 September	Loyalty and Retention are Oxymorons
1 December	The Future of Creditor Insurance

Life & Pensions

14-16 September	European Executive Summit, St Paul de Vence
19 November	The Future of Intermediated Distribution

Mortgages

18 November	London Mortgages Forum
-------------	------------------------

Private Banking & Wealth Management

8 October	Delivering Global Consistency
10 December	Not All Boutiques are the Same

Retail Banking

21 – 23 September	European Executive Summit, St Paul de Vence
-------------------	---

BY MARKETING DISCIPLINE

Corporate Communications

14 October	Getting Ready for a New Government
3 December	Reputation Management in the Digital Age

Direct Marketing

6 October	The Age of Infomagination
20 October	Transactional Marketing

E-commerce

3 September	Advanced Online Customer Acquisition
4 November	Developing Customer Relationships in a Multi-Channel Environment

HR & Internal Communications

12 November	The Role of Personal Impact and Branding
-------------	--

General

17 September	The New Rules of Communication
15 October	B2B Marketing Best Practice
13 October	Making the Customer Experience Count
22 October	The True Value of Brands
3 November	Annual Members' Conference
6 November	Opportunities and Threats Facing the Surviving Mutuals
11 November	Financial Capability
24 November	Annual Members' Dinner
8 December	Consumer Behaviour in Recession

Advisory Board

Chairman:

Mike Tildesley, Marketing Director,
RBS Insurance

Members:

Robin Bulloch, Managing Director,
Branch Banking, RBS & Natwest
Keith Carby, Chief Executive Officer,
Openwork

Leslie de Chernatony, Professor of
Brand Marketing, Università della
Svizzera Italiana, Lugano and Aston
Business School

Christine Ennew, Dean of Law &
Social Sciences, Professor of
Marketing, Nottingham University

Paul Feeney, Head of Distribution,
International Business, BNY Mellon
Asset Management

Howard Flight, Partner, Flight &
Partners

Nigel Gilbert, Group Marketing
Director, Lloyds Banking Group

Ken Hogg, Chief Financial Officer,
MGM Advantage

Phil Jenks, Managing Director, Phil
Jenks Consulting

Graham Kane, Head of UK Retail,
UBS Global Asset Management

Paul Pester Managing Director,
Premium Banking, Santander

Andrew Porter, Managing Director,
The Financial Services Forum

Anthony Thomson, Chairman,
The Financial Services Forum

Patrick Waldron, Chief Executive,
Post Office Financial Services

Associate Members Advisory Board

Asif Chaudhry, Senior Manager
Practice Development, Visa Europe

Dan Giddings, Advertising &
Partnership Manager, AXA Investment
Managers

Moya McGinley, Moya McGinley
Marketing

Joe Pattinson, Marketing Manager,
BMW Group Financial Services

Kirsty Williams, Senior Manager
Competitor & Customer View,
Lloyds TSB

Practitioner Members Advisory Board

Pippa Collett, Managing Director,
Sponsorship Consulting

Laura Hastings, Joint Managing
Director, Lansons Communications

Jo Parker, Chief Executive, Teamspirit

Tim Pile, Chief Executive,
Cogent Elliott

Jackie Stevenson, Brooklyn Brothers

Rory Sutherland, Vice Chairman,
Ogilvy Group

Alan Thompson, Chief Executive,
Haystack Group

Special Interest Group Steering Committees

Asset Management

Chairman:

Magnus Spence

Committee:

Jamie Bullock, Head of Marketing,
Gartmore Investment Management

Piers Currie, Group Head of
Marketing, Aberdeen Asset
Management

Jamie Hammond, Sales & Marketing
Director, Franklin Templeton

Robert Higginbotham, President,
European Mutual Funds, Fidelity
International

Corporate Communications

Chairman:

Tony Langham, Chief Executive,
Lansons Communications

Committee:

Shane O'Riordain, Director of
Communications, HBOS

Peter Yandle, Executive Director
Corporate Communications, Scottish
Widows

E-Commerce

Chairman:

Richard Searle, Head of E-Channels,
Nationwide

Committee:

Guy Beresiner, Head of Client
Strategy, Yahoo!

Jason Bacon, Head of Digital
Marketing, Lloyds Banking Group

Cathy Stuttle, Head of E-Commerce,
M&G Investments

General Insurance

Chairman:

Jaz Saggiu, Director, NewPEL Group

Committee:

Mario Aristides, Head of Business
Development Distribution New
Space, AXA Insurance

Mike Caidan, Head of Sales, Allianz

Jeremy Chadwick, Business
Development Director, AEGON Direct
Marketing Services

Peter Elliott, Head of Marketing,
Bluefin

Neil Galjaard, Insurance Director,
Paymentsshield

Human Resources

Chairman:

Susan Hetrick, Director, The
People Academy

Committee:

Simon Page, Managing Director,
KCSS

Corporate & Investment Banking

Committee:

Paul Abrahams, Head of Corporate
Communications, EMEA Nomura
International

Mark Dailey

Libby Hills, Director, Global Head of
Advertising, Credit Suisse

Katherine Lamb, Co-founder, Ruby
Sky Consulting

Simon Philips

Life & Pensions

Chairman:

David Dunn

Committee:

Simon Clamp, Managing Director
UK, Friends Provident

Dave Edmonds, Head of Protection,
NatWest

Ken Hogg, Chief Financial Officer,
MGM Advantage

Martin Smith, Head of Wealth
Management, National Australia
Group

Robert Watters, Marketing Director –
Protection, Standard Life Assurance

Mortgages

Chairman:

Bharat Sagar, Incisive Media

Committee:

Matthew Carter

Phil Jenks, Managing Director, Phil
Jenks Consulting

John Malone, Managing Director,
PMS

Nigel Stockton, Sales Director,
Mortgages, Lloyds Banking Group

Private Banking & Wealth Management

Chairman:

John Elder

Committee:

Jacqui Brabazon, Global Head of
Marketing, Philanthropy & Talent, The
Standard Chartered Private Bank

June Diment, Head of Marketing
Strategy & Communications, London
Stock Exchange

Corporate partners



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