

directors forum

Speakers include:

- **Nadège Genetay**, Head of Redress Unit, FSA (Keynote)
- **Andrew Fisher**, CEO, Towry (case study)
- **Anthony Thomson**, Chairman, Metro Bank (case study)
- **Rod Butcher**, Head of Customer Experience and Insight, Aviva Group plc
- **Peter Flade**, Senior Managing Partner, Gallup Consulting
- **Deborah Eastman**, Global Head of Business Consulting, Satmetrix
- **Paul Scott**, Director, Global Consulting at Merchants Ltd
- **Andy Scott**, Head of Customer Experience, Banking and Financial Services, Firstsource
- **Conrad Simpson**, Director, Interactive Intelligence

Customer Engagement in Financial Services

13th October 2011, London

How to deliver Customer Engagement in Financial Services in the light of further regulatory changes, the loss of customer trust and the economic backdrop

The Customer Engagement Club Directors Forum on Customer Engagement in Financial Services will highlight the key issues and challenges facing the financial services sector as it strives to get its customer relationships back on track, and will examine what the future holds for this much maligned sector in the light of further regulatory changes, the loss of customer trust and the economic backdrop.

Delegates will learn:

- The strategies financial services organisations are employing to regain customer trust
- How the FSA is bringing in new regulations aimed at ensuring the sector improves its customer service outcomes
- What world class organisations in the sector are leading through genuinely customer centric strategies
- How to differentiate your organisation and win customer trust and gain competitive advantage
- How to measure and quantify the business benefits of engaging customers across channels
- What the future looks like in a troubled sector and what customer strategies are needed to succeed

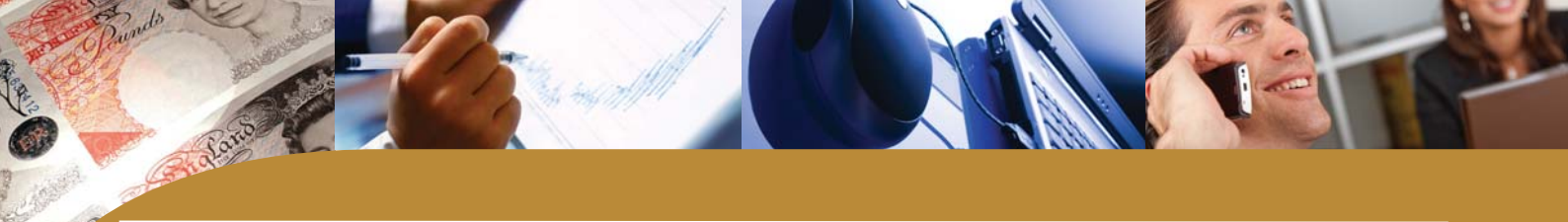


Time: **9:00am – 5:00pm**

Venue: **Gallup Consulting, The Adelphi, 1-11 John Adam Street, London, WC2N 6HS**

For more information contact Chris Wood: chris@ictcomms.com and **+44 (0) 1932 341828** or visit our website: www.customerengagementclub.com

THE SERIES OF CUSTOMER ENGAGEMENT DIRECTORS FORUMS IS ORGAISED BY THE CUSTOMER ENGAGEMENT CLUB



- 8:30 Registration and Coffee

- 9.00 Welcome: James Rapinac, *Gallup Consulting*, Steve Hurst, *Customer Engagement Club*

- 9:05 **Keynote/Q & A - Market Overview from the FSA**
Nadege Genetay - *Head of Redress Unit, FSA*

Overview of the state of the Financial Services sector and how regulatory changes will impact the industry and its relationship with customers.



Nadege Genetay

Nadege Genetay is Head of Department in the Conduct Policy Division at the Financial Services Authority. Nadege is responsible for conduct policy in a range of sectors, including banking and payments, general insurance and mortgages, as well as professional standards and redress (complaints handling, FOS and FSCS compensation). Nadege joined the FSA in 1998 and has held roles in both policy and supervision. She was previously an academic in Manchester, with research interests focused in the financial sector.

- 9:50 **Worldclass customer service - lip service or absolute priority?**
Peter Flade - *Senior Managing Partner, Gallup Consulting*

Unlike volatile equity markets and venture investors, loyal customers can be counted upon to build a solid revenue base as well as deliver growth and profits. But what is it that actually makes customers loyal? Gallup research shows that people stay faithful to brands that earn both their rational satisfaction and their deeply felt affection. No matter what the industry, there's an emotional element to how a customer interacts with a brand. Although most organisations claim that their employees are their greatest asset and their number one priority is delivering worldclass customer service, the reality is frequently quite different. Peter will share how companies who are very deliberately managing employee and customer engagement to impact service quality and reduce service variation, have substantially improved their profitability and growth.



Peter Flade

Peter Flade is a Senior Managing Partner with Gallup and a member of the Executive Committee. Peter is based in London and oversees the European region. Gallup is a global research-based consultancy in applied behavioural economics that helps leaders at every level of business, government and society improve organisational performance by understanding the voice of their constituencies.

Peter works with executive teams to help deliver change. He has published articles in this arena and is a regular presenter at client partner meetings as well as conferences. Prior to joining Gallup, Peter worked in retail management for the Dixons Group (DSGi) and holds degrees from the University of Kent and LSE; he is currently studying at TRIUM. He is fluent in English, Dutch, and Greek and speaks conversational French.-

- 10:30 Coffee

- 11:00 **'Contact Centre Benchmarking report - key trends in the financial services sector'**
Paul Scott, *Director of Strategic Partnerships - Merchants*

Paul Scott, Director of Strategic Partnerships – Merchants, takes a look at the financial sector trends from the Dimension Data Global Contact Centre Benchmarking Report and shares some insights that are driving successful strategic outsourcing.



Paul Scott

Paul has worked in the customer services industry for 20 years. He has worked with a wide range of large international businesses to drive successful customer management strategies. Paul has specialised in helping businesses understand how to create and maintain profitable customer relationships, by creating world class customer service operations. Paul is passionate about bringing innovation to the world of customer experience management.

- 11:40 **'How technology can boost customer engagement in Financial Services'**
Conrad Simpson, *Director, Interactive Intelligence*

Conrad will discuss the role of technologies in helping customer engagement in Financial Services. Using real life examples he'll show how new technologies and complexity need not compromise the goal of getting closer to our customers



Conrad Simpson

As a veteran of the customer care industry Conrad has seen customer care evolve from its earliest beginnings to the complex environment of today. Primarily focussed in the highly regulated Financial Services and Mobile sectors he has helped many businesses (large and small) design and deliver their customer care strategies. Described as a practitioner rather than a theorist Conrad has worked with many of the leading suppliers in the customer care space in both the infrastructure and applications arenas. In his current role at Interactive Intelligence he is primarily helping his customers remove unnecessary complexity and cost as they face the new challenges in customer care such as social networks, multimedia and cloud computing based approaches.

- 12: 20 **Complaints handling - turning a crisis into an opportunity**
Andy Scott, *Head of Customer Experience, Banking & Financial Services, Firstsource*

The number of complaints handled by the Financial Services Ombudsman has more than doubled in the last 4 years, presenting a huge challenge for financial services organisations just in terms of administration and processing. Andy Scott, head of Customer Experience, Banking & Financial Services, at Firstsource Solutions, explains how complaints need to be tackled not just as a problem to be solved, but as an opportunity to develop a more positive customer experience and as a platform for adding value to the business. How can the



financial services industry not only handle the rising number of complaints to achieve productive, profitable and positive outcomes for all concerned as well as transform the public perceptions of banks and financial services companies?



Andy Scott has worked in the Banking and Financial services industry for over 11 years. He spent 9 years at Barclaycard in a variety of customer focused roles before heading the Customer Relationship team for their UK cards division. Andy now runs a global programme at Firstsource to transform complaint management for financial services organisations.

Andy holds a BSc (Hons) in Psychology from Newcastle University, UK.

13:00 Lunch

14:00 **Panel Debate:**
Peter Flade, Steve Hurst, Conrad Simpson, Deborah Eastman, Andy Scott, Paul Scott, Anthony Thomson

15:00 **Creating fans not customers, Metro Bank - Case study**
Anthony Thomson, *Chairman, Metro Bank*

Metro Bank's proposition is all about giving customers a better experience. Anthony Thomson, co-founder and chairman, describes Metro Bank's differentiated model, its unique culture and its relentless execution, which is attracting over 1000 new customers every week.



Anthony Thomson, *Chairman of Metro Bank* Metro Bank launched in the UK last summer with customer focus and service excellence at the very core of its business strategy. Chairman Anthony Thomson tells us how the bank is using customer commitment as a key competitive differentiator in a sector that is not universally known for putting its customers first.

15:35 Coffee

15:50 **Aviva's journey to customer centricity - Case Study**

- Hear about Aviva's journey towards customer centricity and the lessons learned along the way
- Learn how customer journey mapping can contextualise customer feedback and focus your efforts
- Find out what's next in terms of connecting employees to the customer agenda



Rod Butcher, *Head of Customer Experience and Insight, Aviva Group plc*

Rod joined the Aviva Group (Commercial Union) in 1987. In the early stages of his career he served in various roles in the marketing, product development, and major projects areas for the UK Life company.

Following the creation of Aviva he worked in the Group's Corporate Office in a number of areas such as business development and corporate strategy as well as helping set up two internet ventures for the Group. Rod now works on the newly formed global Marketing team, with responsibility for customer experience (including the global roll out of the Net Promoter® Score) and Insight, including the setting up of a 'horizon scanning' system for the Group.

Deborah Eastman, *Global Head of Business Consulting, Satmetrix*



Deborah Eastman leads global consulting for Satmetrix and brings extensive experience in marketing, sales and strategic business development to the organisation. Deborah has spent her career working with customers to deliver solutions that leverage new technology to drive improved business development.

Prior to joining Satmetrix, Deborah was the Managing Principal of Windward Solutions, providing advisory services to business-to-business marketing professionals. Previously, she was Executive Vice President of Sales & Marketing and Chief Marketing Officer for Biz360, an information services company that provides market intelligence to marketing professionals. Before joining Biz360, Deborah served as Vice President and Managing Director at BearingPoint (formerly KPMG Consulting).

16:25 **Driving change in a changing industry**
Andrew Fisher, *CEO, Towry*

Transforming a business to get more from less is never easy and when that business operates in a sector that itself is going through rapid and fundamental change it becomes even more of a challenge. At fast growing Wealth Advice organisation Towry, chief executive Andrew Fisher has spent the past six years doing just that. Here Andrew gives an entertaining and thought provoking blow by blow account of how he has implemented the cultural changes that focussed on the needs of the customer, turning a loss making organisation into a profitable one.



Andrew is Chief Executive of Towry, the Wealth Managers, prior to that he was Chief Executive of Cox Insurance Holdings Plc., the Group Chief Executive of Coutts Group the Wealth Management business of Royal Bank of Scotland, incorporating Coutts & Co. Coutts International, Nat West Private Bank, Nat West Stockbrokers and the RBS Private Banks. During his earlier career Andrew was a senior advisor to one of the world's largest private equity group, the Carlyle Group, and a Partner in the Consultancy practice of Coopers and Lybrand. Andrew is deputy Chair of CHASM (Centre for Household Assets and Savings Management) at the University of Birmingham and also on the DAC (Development Advisory Committee) at Birmingham University. He is on the Board of The National Skills Academy for Financial Services and the Finance Governor for Sandhurst School.

17:00 Forum Summary, Steve Hurst, *Chairman* followed by *Networking & Drinks*

For speaking enquiries contact Steve Hurst
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Agenda subject to change and alteration for circumstances beyond the control of the organiser

