

Time: 9:00am – 4:10pm
Venue: Gallup The Adelphi,
1-11 John Adam Street, London, WC2N 6HS

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www.customerengagementnetwork.com



Customer Engagement in Financial Services

11th October 2012, London

This Directors Forum will highlight the key issues and challenges facing the much maligned financial services sector and its relationships with customers against a backdrop of continued difficult economic conditions. It will offer practical solutions to these challenges for a sector that. It will drill down to the core of the problems and help delegates find the best way forward.



If you have any feedback about this event share it with us by sending a text message, starting with the word 'Engage' to 66099.'



Agenda Summary:

- 9:00: Registration and Coffee
- 9:30: **Welcome: James Rapinac**, Director, Gallup and **Steve Hurst**, Chairman
- 9:35: **Keynote: Fostering a Customer Centric Culture, First Direct**
Andrew Lea, Head of Banking Services, First Direct
- 10:10: **Case Study: Wells Fargo Bank**
Jay Freeman, Gallup Senior Advisor and former Exec VP, Wells Fargo Bank
- 10:45: **'How to engage customers on the right channel and at the right time'**
Jeff Green, Financial Services Client Consultant, Rapide
- 11:20 Coffee
- 11:45 **Case Study: Nationwide Building Society: On your side and the journey to Challenger Brand**
Lynne Wood, Head of Customer Experience, Nationwide Building Society
- 12:20 **Driving success through engagement and action**
Claire Sporton, VP, Customer Experience Management, Confront
- 13:00 Lunch
- 14:00 **Panel Debate: Financial Services where do we go from here?**
Steve Hurst, Forum Chairman, Editorial Director, Customer Engagement Network
- 15:00 **Case Study: RBS, Effortless Engagement - Are you Working Your Retail Customers Too Hard**
Prof Moira Clark, Head of Marketing, Henley Business School & **Stephen Whitty**, Head of Customer Experience, RBS, Business Services
- 15:35 **Case Study: Skipton Building Society**
Conrad Simpson, Director, Interactive Intelligence
- 16:10 **Forum Summary followed by Coffee and Networking**



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Customer Engagement in Financial Services

11th October 2012, London

9:00 Registration and Coffee

9:30 **Welcome: James Rapinac**, Director, Gallup and **Steve Hurst**, Chairman

9:35 **Keynote: Fostering a Customer Centric Culture, First Direct**
Andrew Lea, Head of Banking Services, First Direct

Customer engagement and service excellence are more important than ever before in a Financial Services industry wrestling with a deep mistrust of Banks, increased regulation and the impacts of a harsh economic climate. Andrew will outline the fundamental principles and unwavering customer focus that First Direct hold dear, highlighting the engagement and service strategies that have helped to differentiate the business in such a competitive marketplace. The session will also focus on the need to respond to today's significant challenges and examine what opportunities exist to retain or regain customer trust and loyalty.

Andrew is one of the founding members of First Direct having joined in the summer of 1989 prior to launch on 1 October. He has extensive knowledge of the business having held a number of different roles and currently heading up a diverse range of Operational areas under the umbrella of Banking Services.



10:10 **Case Study: Wells Fargo Bank**
Jay Freeman, Gallup Senior Advisor and former Exec VP, Wells Fargo Bank

Financial Services companies can achieve real and sustainable competitive advantage by recognising that their customer relationships include an essential emotional component that can be measured, managed and improved – one customer at a time. Jay will share his expertise on leading effective customer experience programmes at one of the world's largest and most successful banks. His talk will address:

- Why cross-selling is key to growing your business.
- Bringing great customer service to life.
- Best practices in customer experience concept and execution.

Jay Freeman joined Gallup in 2011 after more than 30 years in the banking industry. He served as Wells Fargo Bank's executive vice president of Sales & Service Development for more than 12 years, developing the bank's customer experience improvement programme, "11 Ways to Wow". Under Jay's leadership, Wells Fargo has established a global reputation for customer service founded on a strategy of creating and sustaining deep customer relationships. As a result Wells Fargo has seen its retail customer household cross-sell increase 62% over the past decade.



10:45 **'How to engage customers on the right channel and at the right time'**
Jeff Green, Financial Services Client Consultant, Rapide

In a heavily scrutinised industry the need for companies in the banking and finance sector to meet and exceed customer expectations has never been greater. For over 12 years Rapide has been helping industry leading clients like Barclays, HSBC and Lloyds do just that. Using real case study examples this presentation will explore how engaging customers in the right way, at the right time can enhance customer experience, increase retention and even generate revenue.

As the financial services consultant for Rapide Jeff uses his decade's experience to help his clients drive cultural change from within. He takes pride in taking a consultative approach to his accounts, taking the time to get to know their key business challenges before recommending innovative solutions. His role at Rapide has seen him work with industry leading clients such as HSBC, Barclays and Lloyds to achieve their business goals.



11:20 Coffee

11:45 **Case Study: Nationwide Building Society: On your side and the journey to Challenger Brand**
Lynne Wood, Head of Customer Experience, Nationwide Building Society

A view from the UK's largest building society on moving customer experience from measures to a business discipline

Lynne joined Nationwide in July 2012 from HSBC where she was Head of Customer Experience. During this time Lynne was responsible for embedding Voice of the Customer (VOC) across the organisation and for championing representation of the customer view in key projects across all segments and channels with the ultimate aim of improving customer engagement. Lynne's success in driving greater customer satisfaction is clear from the 13% increase in HSBC's Business Banking satisfaction scores during her tenure – an achievement recognized 3 years in a row from 2010-2012 where Lynne and her team won the Business Moneyfacts Awards for Best Business Bank for Service.



12:20 **Driving success through engagement and action**
Claire Sporton, VP, Customer Experience Management, Confinnit

Financial services organisations face a multitude of challenges, ranging from regulatory pressures, to complex customer journeys, and rising expectations. The key to thriving in this demanding environment is to ensure you drive engagement at all levels of your organisation, and to empower your employees to do the right thing

for your customers and the business. Easier said than done! Through this presentation, we aim to share some tips about building the right culture, and about delivering results in a measurable way, to ensure long-term success

Claire has recently joined Confirmit to head up the support they provide to organizations in ensuring their Voice of the Customer/CEM programs deliver true business change and return on investment. Specialised in customer feedback for over 15 years, Claire has run her own programs in the Financial Services sector and more latterly with technology / consulting providers supporting a wide range of Fortune 500 companies improve customer experience through the effective use of feedback. Claire is passionate about getting feedback into the hands of people who can make a difference to both the end customer and of course the bottom line



Claire Sporton

13:00 Lunch

14:00 **Panel Debate:**
Financial Services where do we go from here?

Steve Hurst, Forum Chairman, Editorial Director, Customer Engagement Network Panel to include:
Andrew Lea, First Direct, **Jay Freeman**, Former Exec VP, Wells Fargo Bank, **Lynne Wood**, Nationwide, **Stephen Whitty**, RBS

Steve is a successful career journalist, thought leader and published author with a wealth of experience in all forms of media, both offline and online, including local and national press, trade and business publications, TV and radio, websites, social media and online web event broadcasting. Steve, has, for the past decade worked as Editorial Director of the highly respected Customer Strategy (formerly Customer Management) magazine, and is widely recognised as one of the world's leading journalistic authorities across all formats in the fields of customer engagement and strategy and the increasingly important role of online customer engagement and social media strategies in business. Steve is credited with developing the market leading Customer Strategy - both offline and online - into the most authoritative and sought after vehicle in the sector.



Steve Hurst

15:00 **Case Study: RBS, Effortless Engagement - Are you Working Your Retail Customers Too Hard**

Prof Moira Clark, Head of Marketing, Henley Business School & **Stephen Whitty**, Head of Customer Experience, RBS, Business Services

Effortless engagement or 'making it easy to be a customer' is where the real fight for competitive advantage can be found. This session will focus on:

- What do we mean by customer effort?
- Understanding the different types of customer effort
- How to map out the customer effort journey

- How to build customer loyalty by adopting low-customer effort approaches

Moira Clark is Professor of Strategic Marketing at Henley Business School, Head of Marketing and Reputation as well as Director of The Henley Centre for Customer Management. She is a leading expert in the area of Strategic Customer Management. She has researched and published widely on the subject of Customer Management, Customer Experience, CRM, Service Excellence, Social Networking, Customer Retention and Internal Marketing. She has worked extensively in the area of culture and climate, its impact on retention and loyalty and the critical linkages between employee behaviour and customer retention. Moira serves as a consultant and advisor to major UK and international blue chip companies. She is a frequent keynote speaker at many public and in-company seminars and conferences around the world.



Moira Clark

Stephen has worked at RBS for 4 years driving customer-focused lean-orientated improvement projects across many areas of the bank. He currently leads the Customer Experience team in Strategy and Architecture which is responsible for delivery of e2e customer insight to challenge thinking and contribute to decision making processes at a product and service level.



Stephen Whitty

Previously to RBS, Stephen worked across a range of industries including BAE Systems, Airbus, Pickford's, Littlewood's Shop Direct Group leading continuous improvement deployments of Lean and Six Sigma

15:35 **Case Study: Skipton Building Society**
Conrad Simpson, Director, Interactive Intelligence

Conrad will examine how Skipton rose to the challenges presented by an increasingly multichannel business environment. He will look at how Skipton overcame some of the issues around internal silos and at some of the business benefits that have arisen from the organisation's forward thinking multichannel customer engagement strategy.

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 his current role at Interactive Intelligence is primarily helping his customers manage unnecessary complexity and cost as they face the new challenges in customer care such as social networks, multimedia and cloud computing based approaches.



Conrad Simpson

16:10 **Forum Summary followed by coffee and networking**



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The only joined-up customer experience event to drive customer and employee engagement solutions, performance and profitability



From the organisers of the hugely successful Directors Forums series and the Customer Engagement Network a Summit providing customer engagement and employee engagement insights and solutions across all channels.

Speakers to date include:

- **Mike Havard**, Director, Ember Services - Conference Chairman
- **Roger Martin-Fagg**, Economist
- **Professor Katie Truss**, Employee Engagement, University of Kent
- **Jonathan Browne**, Head of Customer Experience, Forrester
- **Mark Bradley**, Expert Commentator, Retail/Fan Engagement
- **Dr Nicola Millard**, Customer Experience Futurologist, BT
- **Qaalfa Dibeehi**, COO, Beyond Philosophy
- **Angela Baron**, Engagement and Development - Chartered Institute of Personnel and Development (CIPD)
- **Colin Adamson** - SOCAP
- **Richard Robinson**, Head of B2B Marketing, Google
- **John Casey**, Director Business Development, Professional Planning Forum
- **Dominic Graveson**, Head of Strategy & Engagement, cScape
- **International Panel**, speakers from Asia-Pacific, US, South Africa and Germany

Plus case studies including:

- Premier Inn
- Aviva
- BT
- John Lewis
- LV=
- Philips
- British Gas
- Everything Everywhere
- Dell
- Experian
- Boots
- Virgin
- BSkyB
- Essex CC

Content will include:

- Customer feedback, measurement and insight
- Voice Of the Customer strategies
- Employee and customer engagement
- Social, digital and mobile customer engagement
- Multi-channel engagement in contact centres
- Customer engagement across industry sectors
- Customer Engagement best practice from around the world
- The customer of the future

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