

Developed by



www.customermanagementexchange.com

SOLUTION PROVIDER INFORMATION PACK



Customer Experience Exchange *for Financial Services*

Build the Strategy. Wow the Customer. Drive the Profit

**18-19 February, 2014
Hilton London Syon Park
London, United Kingdom**

"I've been delighted by the one-to-one business meetings. I was originally a little sceptical about the meetings to be honest but they've proved so useful. Having attended your Customer Contact Exchange last year, I'm already in partnership with several of the providers who I met there, one of whom I'd never previously heard of before the Exchange. A great opportunity that everyone should take advantage of"

Chief Operating Officer, Alpha Card

Independent Research Partner



www.CustomerExperienceExchangeFS.com



Customer Experience Exchange

for Financial Services

18-19 February, 2014
Hilton London Syon Park,
London, United Kingdom

Welcome to the Customer Experience Exchange for Financial Service: Build the Strategy. Wow the Customer. Drive the Profit.

It's time for financial services to think seriously about their customer experience strategy. There's no denying an excellent strategy is a powerful tool, but keeping up with the ever changing demands of customers and the way they choose to interact is something few institutes have successfully been able to achieve. Customers are more demanding, more educated and have more choices than ever before. Consumer based technology is also advancing more rapidly than financial service providers can integrate it within their businesses, making customer expectations even harder to meet.

This represents a huge opportunity for key solution providers to help cure these headaches.

The Customer Experience Exchange for Financial Services brings together **60 C-level and VPs/Directors of Customer Experience, Marketing, eCommerce and Strategy from across the industry** to discuss the practicalities of increasing customer retention and loyalty in this hypercompetitive market. Benefit from positioning yourself as an industry expert in a room packed with senior executives from across a range of financial services, including retail, commercial, insurance, credit cards and more.

Specifically, you will be able to discuss how to:

- Enable a customer centric culture that delivers on their brand promise
- Solve the problem of multiple customer data silos to establish the true 'voice of the customer'
- Effectively adapt to changes in multi channel management in order to ensure a holistic customer experience
- Stay competitive by staying ahead: examining the latest technology innovations available to the finance industry
- Drive revenue and business growth with a coordinated customer marketing strategy

This Exchange offers you the chance to do business with some of the world's largest companies - participating in prearranged one-to-one meetings with customer experience decision makers who are currently in the market for solutions that will provide them with immediate gains.

You'll have direct access to the in-depth profiles of every attendee, including information on their budgets, operational objectives and investment strategies for the coming 6-18 months.

The Exchange Concept

An Exchange is a unique, invitation-only meeting driven by pre-scheduled business meetings between pre-qualified solution providers and senior decision-makers.

Thought-provoking conference sessions, executive roundtables and innovative networking opportunities round out the agenda, resulting in two days of focused, structured business development.

Unlike traditional conferences or tradeshows, the primary focus and benefit of the Exchange is for new relationships to be forged and existing partnerships to be enhanced.

Exchange only invites executives with the highest credentials and solution providers with the most cutting edge capabilities to ensure a true peer-to-peer learning and networking forum.

Staying Connected

The Customer Experience Exchange for Financial Services doesn't just provide you with a once-a-year opportunity to meet with your peers. Through a range of online channels we're delighted to be able to facilitate all year round learning and networking for the global customer experience community. Stay connected through twitter, YouTube, LinkedIn and our online Resource Library, and get the latest news, event updates, exclusive videos, whitepapers and more!

@cmexchange / #CXFS

www.youtube.com/CMxchange

Gain lifetime access to the Customer Management Exchange Network LinkedIn Group

Visit our online Resource Library for complimentary content

Exchange Solution Providers:

Solution Providers are invited based on the requirements of attending delegates. The solution providers at the Customer Experience Exchange for Financial Services specialise in the following areas:

- Enterprise Feedback Management
- Market Research
- Voice of the Customer (VOC)
- Customer Insight
- Business Intelligence
- Analytics
- Big Data
- Customer Loyalty/ Satisfaction/ NPS
- Customer Experience Management
- Online Customer Experience
- Web Portal Enhancements
- Social Media Monitoring
- Social Networking/ Online Communities
- Brand Strategy & Management
- Multi-Channel Integration/ Unified Communications
- Customer Interaction Management
- Customer Complaints Management
- Recruitment
- Employee Loyalty, Rewards and Incentive programmes
- Training & Employee Development
- Change Management
- Mobile Solutions
- Performance Management
- Process Excellence/ Six Sigma /Lean
- Operational Improvement
- CRM Solutions
- Knowledge Management
- Contact Centre Solutions
- Cloud / SaaS solutions
- IVR (Interactive Voice Response)
- Outsourcing

Visit

www.CustomerExperienceExchangeFS.com
for a full list of Sponsor Partners



Customer Experience Exchange for Financial Services

18-19 February, 2014
Hilton London Syon Park,
London, United Kingdom

Leading Case Studies, Discussions & Debates Led By

<p>CHAIRMAN Mike Ashton Managing Director Ashton Brand Consulting Group</p> <ul style="list-style-type: none"> Former CMO, Hilton International Led Hilton to #1 in every major market outside the US Specialising in helping clients drive commercial value 	<p>Jonathan Browne Senior Analyst Forrester</p> <ul style="list-style-type: none"> Leads Forrester's research in Europe on interactive design agencies and personas Cited in publications including Forbes, The Economic Times and thisismoney.co.uk Founding member of Japan's Persona & Customer Experience Association 	<p>Martin Coppack Head of Partnerships FCA</p> <ul style="list-style-type: none"> Leads the FCA's 'engagement with consumers and special interest groups' programme Created the first ever FSAFCA Consumer Network to communicate more effectively with resource-stretched consumer representative organisations 	<p>Caroline Wells Head of Insight Financial Ombudsman</p> <ul style="list-style-type: none"> Promotes better complaint handling in the financial services industry Supports closer-working with consumer advice and local-community agencies Raising consumer awareness and ensuring the ombudsman is an inclusive service for everyone. 	<p>Kenny Jacobs CMO MoneySuperMarket PLC</p> <ul style="list-style-type: none"> Previous responsibility for all advertising, publications, in store and other communication for Tesco CMO of the UK's leading price comparison website Group website attracts 120 million visitors a year and has an online brand recognition of 85%
<p>Michael Gould COO Hiscox</p> <ul style="list-style-type: none"> Led the transformation of operational and IT capability at Hiscox Delivered multi-million pound reduction initiatives whilst improving service levels Built and led the team that transformed the Hiscox operating model and instigated new underwriting processes 	<p>Maryan Broadbent CCO AIA</p> <ul style="list-style-type: none"> Held major leadership roles at Royal Bank of Scotland, GE Money and Metlife Works across AIA's 15 different countries and based in Hong Kong AIA is the number 1 insurance company in Hong Kong 	<p>Darrell Evans CCO Direct Line Group</p> <ul style="list-style-type: none"> 25+ years of experience Worked in a variety of strategic roles from strategy, finance, marketing and product management Previously responsible for all RBS mortgage brands and retail telephone centres 	<p>Alan Grogan CAO RBS</p> <ul style="list-style-type: none"> Responsible for the provision of an advanced modelling capability to deliver business strategy and customer insight Oversees analytics deployment across customer channels Works with COO to align analytics plans, resource and priorities 	<p>Alessandro Hatami Director of Internet Strategy & Chief Operating Officer Digital Bank Lloyds Banking Group</p> <ul style="list-style-type: none"> Responsible for internet strategy at Lloyds Involved in practices for engaging customers using digital banking Over 30 million customers and is the UK's leading provider of current accounts
<p>Tracy Garrad Head of First Direct & Regional Head, Contact Centre Support Utilities First Direct & HSBC</p> <ul style="list-style-type: none"> Leads the operational execution of First Direct's strategy Leads a diverse set of shared service utilities at HSBC 12 years Sales & Marketing experience and 10 years in Financial Services 	<p>Stephen Ingledeu Managing Director Customers & Marketing Standard Life</p> <ul style="list-style-type: none"> Implemented a customer driven strategy across Standard Life Delivers market leading customer engagement and marketing Delivers innovative customer experience models for financial services 	<p>Andrew Richards Director of Regional Retail Banking Metro Bank</p> <ul style="list-style-type: none"> Manages regional store growth as Metro Bank continues to expand Previously held senior roles at TD Bank and Commerce Bank 25+ years experience in financial services 	<p>Anne Grim Managing Director, Global Head of Client Experience Barclays</p> <ul style="list-style-type: none"> Leads Barclays Wealth's global client services, client relations and client experience strategy Delivers exceptional client experience across the globe Previous companies include Wells Fargo, MasterCard and HSBC 	<p>Kevin Goodburn Senior Vice President Customer Experience First Gulf Bank</p> <ul style="list-style-type: none"> Led CX programmes across multiple industry sectors Established CX programme structure in Corporate MNC and local Financial service arenas Delivered process improvement through the CX programme framework in excess of \$5m
<p>Alessandro Colafranceschi Senior Vice President UniCredit</p> <ul style="list-style-type: none"> Global responsibility for Online and Mobile Banking within UniCredit SVP of the largest banking group in Italy Vast experience in senior roles at major FMCG businesses 	<p>Robert Collignon Senior Vice President AEGON</p> <ul style="list-style-type: none"> Chair of AEGON's Brand and Customer Council Lectures in Hospitality Management at the Hague and Erasmus University 15 years experience in Marketing, Sales & Customer Services 	<p>Meltem Uysalar Senior Vice President Citi</p> <ul style="list-style-type: none"> Developed standardized Citi EMEA metrics to measure the health of the customer experience across the region Initiated key process improvement/development projects to design, enhance and fix customer experience Part of Global Customer Experience committee working on Citi global customer strategy 	<p>Helena Dahlberg Head of Customer Experience Swedbank</p> <ul style="list-style-type: none"> 15 years experience focused on defining and driving strategic improvements Consulting experience working in the US and Europe Responsible for the Operational Excellence program at Swedbank 	<p>Oke Eleazu Strategic Advisor Customer Experience Sainsbury's</p> <ul style="list-style-type: none"> Responsible for Customer Experience & Service Strategy Vice President of The Institute of Customer Service Winner of Management Today/Unisys Service Excellence Award for Financial Services
<p>Infor</p> <ul style="list-style-type: none"> Helping 70,000 customers in 194 countries improve operations Offers deep industry-specific applications and suites Allows customers a choice to run their business in the cloud, on-premises or both 				



Customer Experience Exchange for Financial Services

18-19 February, 2014
Hilton London Syon Park,
London, United Kingdom

The Exchange Format

As an Exchange Solution Provider, you will have the opportunity to build your own tailor-made itinerary on our secure website, which means that every session, business meeting and discussion group you attend is tied to your specific business development objectives.

Four weeks in advance of the event, delegates and solution providers receive passwords to the Exchange website. All attending executives will have completed a detailed profile, including information on their specific responsibilities, current and future initiatives and budgets, as well as specific products and services they are actively seeking.

You select the executives you wish to meet in order of priority based on their profile. At the same time, delegates are reviewing the solution provider profiles based on their specific requirements.

Meetings are then pre-scheduled based on mutual matches – where the executive has requested to meet with your company and you have requested to meet with them. You will only be meeting with executives that have an interest in your product or service.

Your meeting itinerary will be provided to you two weeks prior to the event, allowing you to fully research and prepare for your one-to-one business meetings.

Exchange Itineraries Are Intensive But Effective

The time saving format of Exchange means that you will only be meeting with decision makers and more specifically, those that are currently implementing their customer experience strategies. You will not spend any wasted time ‘kicking tyres’ with potential prospects or networking with mid-level managers. You will simply spend 20+ hours conducting business with the most qualified Customer Experience Exchange for Financial Services Executives across the globe that will fill your sales pipeline for the next 12-18 months.



“This format is far greater than any other event as you are dealing with key decision makers and budget holders only”

Consulting Director, Nunwood

Exchange Schedule

Tuesday 18th February, 2014

09:00 Chairman's Welcome

09:10 Session

09:40 Session

10:15 Business Meeting

10:50 Business Meeting

11:25 Session

11:55 Session

12:25 Session

13:00 Lunch

14:00 Business Meeting

14:35 Business Meeting

15:10 Business Meeting

15:45 Session

16:00 Session

16:35 Business Meeting

17:10 Business Meeting

17:45 Session

18:45 Chairman's Close

Wednesday 19th February, 2014

09:00 Chairman's Welcome

09:10 Session

10:00 Session

10:30 Session

11:15 Business Meeting

11:50 Business Meeting

12:25 Business Meeting

13:00 Session

13:30 Lunch

14:30 Business Meeting

15:05 Business Meeting

15:40 Session

16:10 Session

16:50 Closing Remarks



“Extremely interesting presentations and high quality conversations, a great Exchange!”

Vice President, Marketing Solutions,
Thunderhead.com

Customer Experience Exchange for Financial Services Delegates

Typical job titles of attendees include:

- Chief Customer Officer
- Chief Experience Officer
- Chief Marketing Officer
- VP/Director/Head of:
 - Customer Experience
 - Customer Strategy
 - Customer Service
 - Marketing
 - Customer Loyalty
 - Digital/Online Customer Experience

Representing financial institutions from leading B2C and B2B sectors including:

- Retail Banking
- Commercial Banking
- Investment Banking
- Insurance
- Credit Card Agencies
- Consumer Lending
- Accounting
- Exchange Services
- Regulatory Bodies

Who qualifies to attend?

We qualify all attendees on job function and strategic responsibility to ensure you're guaranteed to meet and engage with an elite group of customer experience experts. Every attendee must have an active project within their customer experience function, and must answer 'yes' to two of the following criteria in order to gain an invitation:

- My company's annual turnover is £1 billion or above
- I sit in the C-suite or report directly to the C-suite
- I control or directly influence where customer experience budget is spent
- I control or directly influence corporate strategy at regional, divisional or group level
- I have a personal annual budget of £1 million or above



Customer Experience Exchange

for Financial Services

18-19 February, 2014
Hilton London Syon Park,
London, United Kingdom

A sample of senior executives who attended the 2013 Customer Experience Exchange for Financial Services Included:

Company Name	Job Title
Aegon	VP Customer Experience
Alpha Card	Chief Operating Officer
AVIVA France	Marketing and Communication Director
Banco Santander	Head of Brand Customer Experience
Bank of America	Head of Channel Performance Optimisation
Barclaycard	Head of Operations
Barclays	Customer Experience Director
BBVA	Global Director, Head of Customer Management
BNP Paribas Fortis	Head of CRM
BNY Mellon	Global Innovation Director
Citi	Global Head of Service & Sales
Danske Bank	First Vice President Strategy & Insight, Business Banking
Direct Line Group	Chief Marketing Officer
Erste Bank	Head of Customer Experience Management
First Rate Exchange Services	Head of Marketing & Services
Hastings Direct	Marketing Director
HSBC	Head of Personal Banking Propositions
ING Direct	Head of Customer Strategy & New Product Development
Legal & General	Head of People & Customer Experience
Nationwide	Head of Customer Experience
NEST	Head of Customer Experience
Prudential	Corporate & Consumer Director
RBS	MD Analytics, Marketing & Customer Experience
RSA	Head of Insight
Santander Cards	Head of Customer Experience
Societe Generale	Head of Client Services and Relationship Management
Standard Life	Head of Customer Analytics
Swiss Re	Director of Growth & Strategy
Tesco Bank	Director Business Development & Innovation
UBS	Chief Marketing Officer
Unicredit	Head of Strategic Marketing
Virgin Money	Head of Customer Experience



"The one-to-one business meetings have been a great chance to hear about the providers onsite and extremely useful in discussing up-and-coming opportunities with them"

Head of Customer & Market Intel, Standard Life



"I found the Exchange to be of huge value in meeting executives and suppliers that are of the moment"

Principal, Opera Solutions

"Right people, right format"

Managing Director, Oxyme

Solution Provider Opportunities

Your customised package will be developed based on your current market penetration strategy, from one of the following:

Package	No. of one-to-one meetings	No. of attendee passes
Platinum**	20	3 (includes 1 speaker pass)
Gold Plus*	20	3 (includes 1 speaker pass)
Gold	20	2
Silver Plus*	10	2 (includes 1 speaker pass)
Silver	10	1

** Includes category exclusive speaking opportunity (keynote)

* Includes Think Tank discussion

If you have the expertise and would like to be positioned as a thought leader at this executive level forum, compliment your business meetings with a keynote speaking opportunity or interactive Think Tank discussion (subject to content and availability). Enquire today for further details as space is limited.

Your registration includes:

- Access to secure Exchange website pre-event which includes software assistance and meeting selection support from Exchange Managers, delegate pre-qualification, access to delegate profiles, your company profile on website providing detailed exposure to entire delegation
- Private Company Meeting area, including signage
- Access to all networking functions
- Pre-event marketing and on-site branding, plus a variety of exclusive sponsorship opportunities
- Company logo and profile in on-site full colour catalogue
- Detailed itinerary (including meetings, sessions, networking breaks and meals) from time of arrival to time of departure
- Dedicated IQPC Exchange Account Manager pre-event and on site to assist with any logistical or scheduling requirements
- Access to all speaker presentations and documentation
- Lifetime access to the Customer Management Exchange Network LinkedIn Group
- Forrester Research complimentary report



Customer Experience Exchange for Financial Services

18-19 February, 2014
Hilton London Syon Park,
London, United Kingdom

If you are interested in attending any event from our Customer Management Exchange Portfolio please contact the team on +44 (0) 207 368 9484 or at exchangeinfo@iqpc.com

Independent Research Partner



2013 Media Partners Included



Hilton London Syon Park , London, United Kingdom

Exchange venues are very carefully selected. We believe that the backdrop and ambience are crucial to the success of an Exchange. By tying in rich traditions, historic significance and unsurpassed quality at stunning locations across the globe; these venues present the perfect setting to conduct business and meet a peer group of senior strategists. Our hotels provide a productive retreat, ensuring that you are able to focus on your priorities for participating in this Exchange.



Customer Management Exchange Network

If you like the format of the Exchange, take a look at what else the Customer Management Exchange portfolio has to offer at www.customermanagementexchange.com

