

IN ASSOCIATION WITH

PRIVATE BANKER **RETAIL BANKER**
INTERNATIONAL INTERNATIONAL

5TH EDITION

CUSTOMER EXPERIENCE IN FINANCIAL SERVICES SUMMIT AND AWARDS 2018

THURSDAY 5TH JULY, SINGAPORE



Confirmed speakers:

Nicholas Chee, Executive Director & Head of Digital Engagement, Group Channels & Digitalisation, **UOB**
Shefali Gupta, Executive Director - Senior Vice President Strategy & Planning, **DBS**
Michelle Liew, Head, Group Customer Experience & Channel Management, **RHB Group**
Ketan Samani, Chief Digital Officer APAC, **UBS Wealth Management**
Neil Gardner, Chief Customer Officer – Asia, **Generali**
Vikas Jain, Senior Director - Marketing & CX, **Funding Societies**
Santosh Basker, Executive Director - Digital Transformation, **Standard Chartered Bank**
Axel Gormand, Head of CX Division, **BNP Paribas Wealth Management**
Luzanne Chong, Head of Customer Experience, **FWD**
Neeti Mahajan, Centre Director - Head of Operations, **HSBC Operations**
Saurav Bhatia, Head, Digital Insights, Group Digital Banking, **Standard Chartered Bank**
Sonali Verma, Head Customer Experience and Innovation, **Asia Bancassurance Manulife Financial**
Bart Taylor, Chief Operations Officer, Malaysia, Singapore & Indonesia, **Allianz Worldwide Partners**
Patrick Brusnahan, Senior Reporter, **RBI**

Thursday 5 th July 2018	
08:00 – 08:50	Registration & coffee
08:50 – 09:00	Chair opening remarks Patrick Brusnahan, Senior Reporter, RBI
09:00 – 09:30	Deep Dive into the Power of Personalisation as a Way for Financial Services to Raise Their Game and Meet Customer Expectations <ul style="list-style-type: none">• Seizing every communication opportunity to show your customers you know them, and know them well• Harnessing data analytics to create products and offers tailored to the customer• Social – Mobile - Local: the new key to success for better customer experience?• Exploring hyper-personalisation as the solution to reduce customer churn and attract new business

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	Ketan Samani, Chief Digital Officer APAC, UBS Wealth Management
09:30 – 10:00	Harnessing Digital Transformation to Design a Customer Centric Experience <ul style="list-style-type: none">• Building CX into the design of products – how to utilise customer data to build products which place the customer in the centre• The role of testing new products and offers before market launches – how to receive accurate feedback and action findings• Confirming customers and workers as the center of product development• Exploring challenges faced from an operational point of view when developing better CX Axel Gormand, Head of CX Division, BNP Paribas Wealth Management
10:00 – 10:45	Panel discussion: Exploring How you Embrace New Trends and Technologies to Enhance Customer Experience <ul style="list-style-type: none">• Blurring the lines between front and back offices making all your employees take part in the customer journey and get the best from them• Embracing AI to streamline your operational processes and deliver seamless customer service• Leveraging on data analytics to better understand your customers and develop personalised products and services• Developing omnichannel strategy using AI and reallocating your resources to offer 24/7 banking service• Making your customer forget you are financial services by the quality and invisibility of your service Sonali Verma, Head Customer Experience and Innovation, Asia Bancassurance Manulife Financial Shefali Gupta, Executive Director - Senior Vice President Strategy & Planning, DBS Bart Taylor, Chief Operations Officer, Malaysia, Singapore & Indonesia, Allianz Worldwide Partners
10:45 – 11:15	Coffee & networking

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11:15 – 11:45	<p>Unveiling the Challenges and Opportunities Omnichannel brings for Improving The Customer Experience and Creating a Frictionless Customer Journey</p> <ul style="list-style-type: none">• Understanding the customer’s needs on each channel in order to effectively target your audience• Ensuring consistency in the information customer’s access across different communication channels• Harnessing new technology like Chatbots to achieve a 24/7 service across different channels• Highlighting omnichannel as a key opportunity to analyse channel performance to determine how best to reach target markets <p>Nicholas Chee, Executive Director & Head of Digital Engagement, Group Channels & Digitalisation, UOB</p>
11:45-12:15	<p>Exploring How to Win Customer Loyalty in the Digital Era</p> <ul style="list-style-type: none">• Capitalising on customer data to propose rewarding local offers which match buying habits• Back to basics: Balancing human service with digital engagement• Seeing loyalty as a process: Don’t take your customers for granted and ensure you provide high quality service at every Moment of Truth• Embracing digital innovations and near field marketing to engage your customers wherever they are <p>Michelle Liew, Head, Group Customer Experience & Channel Management, RHB Group</p>
12:15 – 13:35	Lunch & networking
13:35 – 13:55	<p>On-stage Interview: Leveraging New Technology to Drive Efficiency and Make The Customer Journey Easier, Faster, Cheaper (Title TBC)</p> <p>Neeti Mahajan, Centre Director - Head of Operations, HSBC Operations</p>
13:55 – 14:25	<p>Capitalizing on Data Analytics and Big Data to turn Customer Insights Into Strong Customer Experience</p>

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	<ul style="list-style-type: none">• Leveraging on data analytics to build segmentation strategies and better target your customers• How can organisations work to better understand the needs and priorities of their customers?• Using the huge amount of data generated by your customer's buying habits to understand them and create personalised products and loyalty offers• Discovering how to cut through the noisy data using advanced analytical tools – ensuring you define your questions to derive actionable information <p>Saurav Bhatia, Head, Digital Insights, Group Digital Banking, Standard Chartered Bank</p>
14:25 – 14:55	<p>Getting Inspired from Start-ups to Reach Higher Levels of Customer Satisfaction</p> <ul style="list-style-type: none">• Exploring the positive impact of a successful chatbot for a peer- to - peer company• Highlighting the challenge of communicating one unique message through all the different channels• Overcoming the challenge of cyber security and CX• Emphasizing the role of feedback and customer centricity when launching new product and communicating with them <p>Vikas Jain, Senior Director - Marketing & CX, Funding Societies</p>
14:55 – 15:30	<p>Afternoon break and networking</p>
15:30 – 16:00	<p>Redesigning the Internal Organisation of Your Company From a Customer Satisfaction Point of View</p> <ul style="list-style-type: none">• Considering every interaction with your customers as a reflection of your brand proposition to provide best quality services all the time• Designing your operations processes from the point of view of your customers: What will benefit them the most?• Balancing customer satisfaction and business profitability : Can customer happiness drive profitability and can you prove it <p>Neil Gardner, Chief Customer Officer – Asia, Generali</p>

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16:00 – 16:45	<p>Panel Discussion: Exploring Collaboration between Fintech and Incumbents to Drive Company Culture Change</p> <ul style="list-style-type: none">• Integrating the customer experience team into other departments to create a unified and comprehensive CX strategy• Nurturing collaboration with Fintech companies to maximize industry expertise and customer engagement• Drawing inspiration from Fintech on how to leverage new technology without the burden of legacy systems• Collaborating with Fintech companies to stay ahead of new trends <p>Santosh Basker, Executive Director - Digital Transformation, Standard Chartered Bank Luzanne Chong, Head of Customer Experience, FWD Neeti Mahajan, Centre Director - Head of Operations, HSBC Operations</p>
	<p>Chair's Closing Remarks</p> <p>Patrick Brusnahan, Senior Reporter, RBI</p>
18:30 – 19:30	<p>Drinks Reception and Registration for CXFS Awards Dinner</p>
19:30 – 22:30	<p>CXFS Asia Awards Dinner</p>