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FUNDTECH 2019

SUPERFUND TECHNOLOGY, INNOVATIONS AND DISRUPTION CONFERENCE

August 8th - 9th , 2019 | Bayview Eden Hotel, Melbourne

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Prioritising And Accelerating Technology & Innovation Adoption To Sharpen Your Competitive Edge, Efficiencies, Enhance Member Experience & Resilience

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  <p>Josh Parisotto Executive Manager, Distribution VicSuper</p>	  <p>Dirk Dobbs Head of Strategy Management and Product, Hesta</p>	  <p>Monique Bate Head of CX, Cbus Super</p>	  <p>David Horton Executive Manager of VoC Insights, Suncorp</p>	  <p>Phillip Kingston CEO & Founder, Sargon</p>
  <p>Nicole Shoaie Customer Experience & Insights Leader, Design thinking, First State Super</p>	  <p>Mirco Hering Global Lead for DevOps & Agile, Accenture</p>	  <p>Abbas Kudrati Chief Security Advisor, Cybersecurity Solutions Group, Microsoft</p>	  <p>Josh Wilson CEO, Grow Super</p>	  <p>Grace Palos CMO, Future Super</p>
  <p>Georgina Lee Head of Growth and Client Experience, Mercer</p>	  <p>Joel Lipman Partner Deloitte Digital</p>	  <p>Grant Callaghan CEO and Founder Laneway Analytics</p>	  <p>Samantha Clarke CEO and Founder Advice Regtech</p>	  <p>Ahmad Racheha Head of Digital, First State Super</p>
  <p>Adrian Verdnik Partner, Hillcox and Pearl</p>	  <p>Steve Baty Principal and Co-founder, Meld Studios</p>	  <p>Cambell Holt Chief Customer Officer, Mercer</p>	  <p>Nicholle Lindner Board member & Advisor, Arkratos Blockchain Solutions</p>	  <p>Stephen Huppert Director Stephen Huppert Consulting</p>
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  <p>Duncan McPherson CEO, Link Advice</p>	  <p>Margot Birbeck Director, inQuba,</p>	  <p>Dr Munib Karavdic Conjoint Professor, School of Marketing UNSW Business School, UNSW</p>	<p>Researched & Developed by:</p>   <p>REGISTER NOW:</p> <p>PH: 02 9896 0776 FAX: 02 9896 0796</p> <p>register@ibr.com.au www.ibr.com.au</p>	

**SUPERFUND TECHNOLOGY, INNOVATIONS
AND DISRUPTION CONFERENCE**August 8th - 9th , 2019
Bayview Eden Hotel, Melbourne**Conference Overview**

The Superfund industry is facing a tirade of ongoing change and upheaval from rapid technology advancements ,disruption and economic uncertainty to heightened member expectations, regulatory demands and intense scrutiny stemming from the Banking Royal Commission and Productivity Commission research findings. There is no time to waste but to fully accept and embrace today's challenges and use technology and an innovativeway of thinking and working to deliver greater efficiencies, enhanced member engagement,a competitive edge and resilience.

This event, the third instalment in a successful series highlighting technology, innovation and disruption specifically in Superfunds, will take an in-depth look at the very latest technologies and innovative strategies that trailblazing FSI and Superfunds are implementing organisation wide and that are available to help other superfunds propel them forward on their digital transformation journeys.

Over two jam packed days, thought leaders and industry practitioners will gather to share their insights via a series of case study presentations and panel discussions into highly relevant topic areas including:

- What superfunds must do to now to perform exponentially and succeed in the 4th Industrial Revolution and stay viable and sustainable
- Understanding what digital transformation means for the superannuation business?
- Focusing on the customer, trust, security and agility as key elements for success
- Technologies expected to be the biggest game changers in the FSI
- Driving transformation in an ecosystem of regulators, legacy infrastructure and fintech disruption
- Nurturing a digitally skilled workforce with innovative and visionary mindsets
- Data driven and member first strategies and applications

Attend solo or bring your colleagues to learn and share vital information that will equip you with the very latest in innovative thinking and technologies and actionable strategies to adopt that will help in achieving successalong your digital transformation journey.To avoid disappointment, book today to save your place.

**Who Should Attend**

An anticipated delegation consisting CEOs, CDO's and CIO's and managers of Superfunds, SMSFs, insurance companies, wealth and asset managers, IT, digital and agile consultants, academics, regulators, lawyers, compliance offers, member admin and investment operations managers, service providers, data analysts, scientists and researchers, fintech start-ups and innovators, digital marketers, innovation and design thinkers, risk managers, customer experience and engagement specialists, and other stakeholders.



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SUPERFUND TECHNOLOGY, INNOVATIONS AND DISRUPTION CONFERENCE

August 8, 2019
Bayview Eden Hotel, Melbourne

Day One -08, August

8.00 Registration and networking
8.55 Opening remarks from the Chair

Stephen Huppert, Director, *Stephen Huppert Consulting*



9.00

NAVIGATING A COMMITTED AND STEADY PATH THROUGH THE COST AND COMPLEXITY OF TECHNOLOGY AND INNOVATION ADOPTION, IN AN EVER CHANGING AND CHALLENGING ENVIRONMENT

- What superfunds must be doing now to perform exponentially and succeed in the 4th Industrial Revolution and stay viable and sustainable
- From digital transformation to embedded innovation and alignment to superannuation strategic business objectives
- Investment decisions that will pay off in the long term?
- Focusing on the member, trust, security and agility as key elements for success
- Technologies expected to be the biggest game changers in the FS
- Driving transformation in an ecosystem of regulation, legacy infrastructure and fintech disruption
- Nurturing a digitally skilled workforce with innovative and visionary mindsets



Panellists: **Joel Lipman**, Partner, *Deloitte Digital*
Cambell Holt, Chief Customer Officer, *Mercer*
Ahmad Racheha, Head of Digital, *First State Super*

Moderator: **Stephen Huppert**, Director, *Stephen Huppert Consulting*



9.50

SELF DISRUPTION - EMBRACING CHANGE AND EMPLOYING DISRUPTIVE STRATEGIES TO STAY AHEAD OF THE GAME

- Being fearless in creating a culture of disruption
- Integrating disruption into your organisation and your value chain
- Moving from traditional organisation models to new ways of thinking and doing
- Seeing disruption as an opportunity to do things better
- Working with start ups and engaging external partners

Georgina Lee, Head of Growth and Client Experience, *Mercer*



10.20

'BUILDING THE TECHNOLOGY TO POWER THE SUPER FUNDS OF THE FUTURE'

- From disruption to Hayne – the threats and opportunities for superannuation
- What's RegTech, how can it help and what's next?
- How do we overcome the barriers to fully harnessing the value of RegTech?
- What potential exists to export Australia's super system and capabilities, and what impact could it have?

Phillip Kingston, CEO & Founder, *Sargon*



10.50 Morning Coffee

11.20

INTRAPRENEURSHIP – THE WAY TO GENERATE GROWTH IN ESTABLISHED ORGANISATIONS

There is an emerging need for new types of professionals known as Intrapreneurs, to fill the gaps between the culture & energy of start ups & the scale of the opportunity within large organisations. They are creative people who are natural at navigating complex organisations & communicating across diverse areas of the innovation process. In order to generate sustainable growth solutions, companies have to develop an environment that will consistently deliver new customer solutions. To achieve this, they need strong 'people capabilities' to drive this growth. Dr. Munib Karavdic, conjoint professor at UNSW, has spent his career establishing & navigating award-winning innovation programs for large organisations like AMP, St George Bank, & NSW Department of Education. In this session he will provide further insight into the meaning of intrapreneurship.

DrMunib Karavdic, Conjoint Professor, *School of Marketing, UNSW Business School, UNSW*



11.50

UNLEASHING INNOVATION THROUGH NEW WAYS OF THINKING

- Igniting innovation and visionary thinking within teams
- Transforming people, process and technology at the same time
- Leveraging talent to be value creators for the member, enabled through simplified architecture and automation
- Reskilling your workers to be digital literate
- Practical approaches to bridging skills gaps

Josh Parisotto, Executive Manager, *Distribution, VicSuper*



12.20

HUMAN-CENTRED DESIGN POST HAYNE

- The need to rethink and realign organisational purpose around customer value
- Creating strategic empathy for customers to inform decision-making
- Creating a customer centric culture
- Aligning customer centricity and organisational value

Steve Baty, Principal and Co-founder, *Meld Studios*



1.00 Lunch and networking

2.00

UNLOCKING VALUE THROUGH STRATEGIC CYBER SECURITY INVESTMENT IN THE CLOUD

- Cloud is a security imperative
- Digital transformation journey from legacy to cloud
- Top tips in migrating to cloud
- Security consideration, risk and pitfall to avoid in cloud migration

Abbas Kudrati, Chief Security Advisor, *Cybersecurity Solutions Group, Microsoft*



2.40

COMPLIANCE AND REGULATION TECHNOLOGY – A NON-NEGOTIABLE INVESTMENT TO BENEFIT MEMBERS/CLIENTS AND ENHANCE SUPERFUND EFFICIENCY AND SUSTAINABILITY

- Superfunds that invest in compliance technologies invest in their future success
- Working to achieve best practice in compliance processes and systems to benefit and protect members
- Building robust compliance frameworks that support technology upgrades
- New regulations on the horizon

Co-presentation: **Samantha Clarke**, CEO, *Advice Regtech*,
Adrian Verdnik, Partner, *Hall and Wilcox*



3.20 Refreshments and networking

Panel discussion

3.50

LATEST DIRECTIONS IN TECHNOLOGY AND INNOVATION TO ENHANCE MEMBER EXPERIENCES

- Driving scalable and sustainable innovation to enhance member experiences and engagement
- Leveraging technology and customer journey mapping to build trust and deepen relationships
- Utilising VoC as a critical component in delivering value and improving member satisfaction
- Enhancing the CX at every touchpoint

Moderator:

Nicole Shoaie, Customer Experience & Insights Leader, *Design thinking, First State Super*

Panellists:

Monique Bate, Head of CX, *Cbus Super*

Grace Palos, CMO, *Future Super*

David Horton, Executive Manager of VoC Insights, *Suncorp*



4.30 Closing remarks from the Chair

4.15 Networking drinks



SUPERFUND TECHNOLOGY, INNOVATIONS AND DISRUPTION CONFERENCE

August 9, 2019
Bayview Eden Hotel, Melbourne

Day Two -09, August

8.00 Registration and Networking
9.00 Opening remarks from the Chair

Stephen Huppert, Director,
Stephen Huppert Consulting



9.10

"BRINGING REAL-TIME PAYMENTS TO THE WORLD OF SUPERANNUATION"

- The New Payments Platform (NPP) provides a fast, flexible and data-rich payments system for Australian consumers, businesses and government agencies, enabling them to make real-time data rich payments between bank accounts
- By utilising the NPP's data and real-time capabilities, improvements could be made to how superannuation payments are processed today
- NPP Australia are currently developing payment message standards and capabilities that could enable the processing of superannuation payments across the NPP

Adrian Lovney, CEO, New Payments Platform Australia Ltd



9.50

ATTRACTING, EXCITING AND RETAINING MEMBERS THROUGH NEXT GENERATION DIGITAL MARKETING AND SOCIAL MEDIA TOOLS

- How to prompt and own original thought-leadership using social and digital channels and techniques
- Using social and digital to engage with, attract, and nurture members using digital and social.
- New developments in online and social marketing
- Managing digital programs through cost effective and simple to use technology.

Emma Lo Russo, CEO, Digivizer



10.30 Refreshments and networking

11.00

CREATING PERSONALISED VIDEO CONTENT TO OPTIMISE MEMBER/CLIENT ENGAGEMENT

- Damian will share key learnings & insights from working extensively with superfunds on:
- How personalised videos help with member engagement?
 - What is the best use of personalised videos?
 - How to optimise results & key factors that secured a 7X result?
 - The best tips to get a green light from legal and compliance ?
 - How to deploy a very quick proof of concept & test the waters?

Damian Blumenkranc, CEO, Attento



11.40

Panel discussion

TECH AND INNOVATION DIRECTIONS IN ADVICE PROVISION

- Advice provision in a Post Hayne environment – regulatory aware and operating in best interests of members/clients
- Using robo-advice and fintech to help educate and empower members/clients in decision making from accumulation to decumulation
- The power of AI in shaping customer motivations and preferences – (ethical issues?)

Moderator: **Jason Andriessen, MD, CoreData Research**
Panellists: **Dirk Dobbs, Head of Strategy Management and Product, Hesta**
Duncan McPherson, CEO, Link Advice



12.20

HOW SUPERFUNDS CAN ACCELERATE THEIR DATA AND ANALYTICS CAPABILITIES WITH CLOUD BASED SOLUTIONS AND LEADING VISUALISATION TOOLS

Grant Callaghan, CEO and Founder, Laneway Analytics



1.00 Lunch and networking

2.00

AI – ENTERPRISE WIDE SOLUTIONS THROUGH ADVANCED AUTOMATED TECHNOLOGY

- The importance of using AI to solve real business problems and delivering rapid outcomes
- How AI can retain customers and strengthen your member base
- Managing the sophisticated risks of AI
- Leveraging AI and automation to drive data security
- How to develop an AI strategy with big data, analytics toolkits and machine learning?
- Coupling AI and real-time data analytics to drive innovation in product design and delivery



Nicholle Lindner, Board member & Advisor, Arkratos Blockchain Solutions

2.50

Panel discussion

BLOCKCHAIN - OPTIMISING EFFICIENCY GAINS ALONG THE WHOLE VALUE CHAIN

- How can blockchain deliver benefits superfunds and its members?
- What parts of the value chain can blockchain be used for?

Panellists: **Ross Fox, MD, ANZ, Calastone**
Josh Wilson, CEO, Grow Super

Moderator: **Nicholle Lindner, Board member & Advisor, Arkratos Blockchain Solutions**



3.20

Case study

UPGRADING LEGACY SYSTEMS TO AGILE IN AUSTRALIA

Business Agility is something many organisations are striving for. Yet it often is a difficult goal to achieve as the existing culture, processes and systems architectures are obstacles for the transformation. In this session Mirco will explore the transformation journey and how decoupling heritage systems from digital systems can enable new ways to engage stakeholders. This decoupling can also enable new ways of working internally and uplifting the engineering capabilities. Something we all need to do in the age of "Software is eating the world"

Mirco Hering, Global Lead for DevOps & Agile, Accenture



4.00 Networking and refreshments

4.20

Group interactive table discussion

FOCUS ON DIGITAL TRANSFORMATION JOURNEYS

The digital transformation journey is a costly and complex undertaking. For Superfunds whether firmly entrenched or relatively early in digital adoption it is a long process with many choices and decisions to be made that will directly impact the future success of the fund and member outcomes. This conference has presented an array of technologies and innovative strategies that can be employed for success but how does it all stack up in reality? This highly interactive session is designed to give the delegation and those closely engaged in digital change the chance to share their personal insights and discuss various issues that are likely to be encountered along the journey.

Some of these issues will be posed inside a series of questions to the delegation, to be discussed after being divided into brainstorming groups. After a short discussion a representative will be nominated as spokesperson to provide feedback to the delegation and ignite further information sharing.

Sample questions include:

- What steps should be taken to make the best decisions now that will have the greatest reward in the longer term?
- How do you best cultivate a member first, risk adverse and compliance conscious culture?
- How do you decide what latest technologies are appropriate for my superfund and what should be implemented and when? What should be outsourced and handled in-house?
- How do you build cross-functional staff, capable of integrating soft skills with digital capabilities to drive innovation and efficiency within the organisation?
- How do you incrementally innovate and build success step by step?
- How do you plan for and implement the digitally required agile infrastructure for the future, today?

Facilitator

Stephen Huppert, Director, Stephen Huppert Consulting



5.00 Closing remarks from the Chair

5.10 Close of Conference



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