

FINCX2019

Future Digital Marketing Strategies for Member Engagement & Customer Experience (CX)

For Financial Services 2019 Forum

20th - 21st November | Grace Hotel Sydney

Achieving substantial results through developing the most effective digital marketing roadmap to fit their target market & also learn how to boost engagement and CX using personalisation and a blend of technology, process and people



Hear From Industry Experts:



Peter Little
 Head of Brand and Member
 Marketing Communications
 Cbus Super



Mike Nixon
 Head of CRM,
 TAL



Todd Stevenson
 GM Customer and Marketing
 Colonial First State



Emma King
 Platform Owner - Website &
 Interactions, AMP



Tim Cochrane
 Head of Customer and Marketing
 QSuper



Ben Shute
 Senior Manager, Social Media
 and Content Marketing, QBE



Anita Ayres
 Head of Innovation,
 First State Super



Narelle Howard
 CRM Leader, Mercer



Karen Ganschow
 Former GM Consumer Marketing
 and Customer Strategy, NAB



Kimberley Roberts
 Head of Member Experience &
 Engagement RACQ



Danielle Cerin
 Head of Marketing
 CBHS Corporate Health



Dan Monheit
 Director of Strategy
 Hardhat



Adriana Aleksic
 Head of Product
 Defence Health



Dave Annesley
 Head of Marketing, Media and
 Sponsorships Youi



Steve White
 Head of Marketing and Communications,
 APAC, Gallagher



Grace Palos
 CMO
 Future Super



Steve Lockwood
 Head of Insights & Marketing Analytics
 Finder



Tom McCann
 Principal, Head of Member Experience, Aon



Lauren Quaintance
 Co-Founder/Head of Content
 Storyation



Darlene Mattiske-Wood
 CEO and Chief Strategy, Marketing & People
 Officer People's Choice Credit Union



Lauren Ryder
 CEO, Leading Edge Global



Cahyadi Poernomo
 Head of Data, BI and CRM,
 Centrepoint Alliance



Craig Hockley
 Head of Marketing, Guild Insurance



Jordan Kerr
 Social Media & Content Marketing Lead,
 Integrity Life



Researched & Developed by:



Future Digital Marketing Strategies for Member Engagement & Customer Experience (CX) for Financial Services 2019 Forum



REASONS TO ATTEND:

- Hear how the best in your sector across Australia are achieving substantial results through developing the most effective digital marketing roadmap to fit their target market
- Understand how to innovate and create a shift in digital content to sustain impressive ROI
- Learn how to boost engagement and CX using personalisation and a blend of technology, process and people
- Improve the efficiency and cost-effectiveness of your marketing initiatives through operational innovation
- Leverage the experience of those who have created and seamlessly executed a holistic and effective digital marketing strategy

WHO IS IT FOR?

This series is designed for Heads/Directors, Managers of and professionals involved with:

- Digital Marketing
- Marketing
- CX
- Communications
- Engagement
- Transformation
- Process Improvement
- Innovation
- Technology
- Customer Data/Insights/Analytics
- Social Media
- Organisational Change & Culture



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TOP 5 REASONS TO SPONSOR

- Build brand recognition with your target audience
- Demonstrate thought leadership and create trust
- Make face-to-face connections and generate leads
- Collect intelligence on your target market's key challenges
- Network with senior leaders and forge key relationships

***Limited exhibit space and sponsorship packages are available.**

Future Digital Marketing Strategies for Member Engagement & Customer Experience (CX) for Financial Services 2019 Forum

DAY 1 – 20th NOVEMBER

8:30 Coffee and Registration

8:55 WELCOME REMARKS FROM CHAIRPERSON

LAUREN RYDER, CEO, Leading Edge Global

9:00 HOW BRANDS CAN WIN, ACCORDING TO BEHAVIOURAL ECONOMICS TO GET A COMPETITIVE EDGE TODAY, MARKETERS NEED TO TAKE EVERY ADVANTAGE.

Where better to look for advantages than the world of Behavioural Economics, a relatively new field of study that explores the irrational, but often predictable, ways that humans make decisions. Since its inception in the late 1970's, behavioural economics has set out to help us understand why we consistently underestimate, overpay, and make decisions that even at the time, we know we'll regret.

In this lighthearted, informative presentation, Dan Monheit explores how playing to biases and heuristics can pay major dividends for brands. Drawing on seminal research from Nobel Laureates, he'll illustrate how initiatives that fly in the face of conventional wisdom could be just what the doctor (read: CFO) ordered.

As one half of Bad Decisions (one of the world's most successful behavioural economics podcasts), Dan takes everything he's learnt from his significantly more talented co-host (acclaimed psychologist Dr Melissa Weinberg), and channels it into helping marketers win more customers, make better ads and sell more stuff.

DAN MONHEIT, Director of Strategy, Hardhat

9:30 PERSONALISATION: USING MARKETING AS THE OWNER AND DRIVER OF CX

- Leveraging data to create personalised marketing campaigns and communications
- Quality not quantity: Analysing how to best minimise marketing communication to improve CX
- Improving the two-way dialogue and integrating customer feedback to make necessary and beneficial changes

KAREN GANSCHOW, Former GM Consumer Marketing & Customer Strategy, NAB

10:00 INCREASING ENGAGEMENT: OBSESSING OVER QUALITY OF EXPERIENCE AND VALUE

PANEL DISCUSSION

- Driving conversion across the customer lifecycle and improving customer communications through Email marketing
- Leveraging and integrating analytics to better understand customer journeys and executing the most effective improvements for your customer base
- Leveraging social media marketing as a customer advocacy tool and prompting acquisition
- Improving your social listening capabilities and using the right content curation to boost engagement
- Upping your entertainment: Competing as a finance from against influencers, viral videos, etc to attract and engage your audience

PANEL MEMBERS:

GRACE PALOS, CMO, Future Super
ANITA AYRES, Head of Innovation, First State Super
CAHYADI POERNOMO, Head of Data, BI and CRM, Centrepoint Alliance

10:40 MORNING TEA

11:10 MASTERING VIDEO MARKETING TO IMPROVE ENGAGEMENT AND CX

- Why you must be using video - understating how video marketing fits your business and building it into your marketing and content strategy
- How to best leverage video brand awareness and boost engagement
- Deciding on the most impactful content and ensuring it is viewed
- How to build an effective distribution model

BEN SHUTE, Senior Manager, Social Media and Content Marketing, QBE

11:50 LEVERAGING DIGITAL ANALYTICS TO DELIVER MORE TARGETED CONTENT AND COMMUNICATION

- Improving your analytics capabilities to analyse defects and opportunities to improve
- Using analytics to inform your strategy and further develop the most lucrative channels
- Integrating marketing with the business analytics and insights team

KIMBERLEY ROBERTS, Head of Member Experience and Engagement, RACQ

12:30 LUNCH

1:30 DEVELOPING THE MOST IMPACTFUL DIGITAL MARKETING ROADMAP TO ENGAGE AND RETAIN CUSTOMERS

- Creating an 'agile roadmap' to easily adjust to market demands and changes
- Designing and developing a sustainable, positive digital brand
- Aligning your structure, technology and skills to fit your strategy
- Gaining a competitive edge: identifying and focusing efforts on the most lucrative avenues for growth

DANIELLE CERIN, Head of Marketing, CBHS Corporate Health

2:00 HOW TO USE RESEARCH AND INSIGHTS TO REIMAGINE AND BUILD A BRAND THAT TRULY STANDS OUT

- Setting up the brand health metrics that matter
- Tackling uncomfortable truths about your brand
- The importance of creating a clear brand identity in order to build a better overall customer experience
- How insights can drive action and improvement across the whole business

STEVE LOCKWOOD, Head of Insights and Marketing Analytics, Finder

2:30 AFTERNOON TEA

3:00 PROMOTING AND EMBODYING A CULTURE OF "MISTAKES = LEARNING"

- Encouraging new, innovative ideas and cultivating the environment to bring them to life
- Measuring the effectiveness of your culture and understanding where improvements can be made
- Change management: ensuring changes and new improvements are rolled out and communicated effectively so all staff are onboard

CRAIG HOCKLEY, Head of Marketing, Guild Insurance

3:30 HARNESSING I.A.: THE INTELLIGENT AMPLIFICATION APPROACH TO SOCIAL MEDIA AND CONTENT MARKETING

- Replacing A.I with 'I.A.': focusing on the transhumanistic idea to use technology to boost human intelligence and performance and applying to your social media and content marketing
- How to leverage social insights
- Crowd solving problems: Ditching the need to be perfect to gain advocacy and engagement by asking customers for solutions and improvement ideas
- Marketing through people and not at them: creating content that adds value, not just sells your product
- Executing invitation not interruption marketing
- How to empower the right conversations to happen even if you aren't present and ensure your brand stays clear and true

JORDAN KERR, Social Media and Content Marketing Lead, Integrity Life

4:00 CREATING AND EXECUTING A STELLAR CONTENT MARKETING STRATEGY

- Developing a solid strategy to ensure your content marketing hits the mark
- Leveraging insights to generate the right content that is relevant to your audience
- The role of storytelling and creativity: creating engagement using customer stories to humanise your brand

LAUREN QUAINANCE, Co-Founder/Head of Content, Storyation

5:00 CLOSE OF DAY 1

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DAY 2 – 21st NOVEMBER

8:00 Coffee and Registration

8:50 WELCOME REMARKS FROM CHAIRPERSON



LAUREN RYDER, CEO, Leading Edge Global

9:00 THE NEW ROLE OF THE CMO IN PROMOTING CREATIVITY AND CUSTOMER-CENTRICITY

- Creative thinking and leadership: avoiding the automation trap
- Getting your voice heard at the Board level: making your company see the value in a creative and human approach to operations
- Balancing the investment in machines and human resources and ensuring you gain senior executive buy-in for your vision



TODD STEVENSON, GM Customer and Marketing, Colonial First State

9:30 BRAND: REIMAGINING MARKETING POST ROYAL COMMISSION – THE TRANSFORMATION WE NEEDED

- Marketing and communications post Royal Commission: regaining trust and engagement
- Creating engaging conversations with prospective customers and retaining them
- Where to focus: finding the right prospects, right time...place...context...content

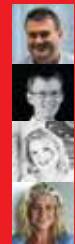


DAVE ANNESLEY, Head of Marketing, Media and Sponsorships, Youi

10:00 CREATING A SMOOTH OMNI-CHANNEL BRAND EXPERIENCE

PANEL DISCUSSION

- Inking communications: ensuring alignment across all channels
- Ensuring you're targeting the right customer through the right channel at the right time
- Is mobile-first the right approach for financial services?
- Creating a great communications experience for customers on any device
- Using actionable data to guide the right direction for each marketing channel



PANEL MEMBERS:

- BEN SHUTE, Senior Manager, Social Media and Content Marketing, QBE**
- TIM COCHRANE, Head of Customer and Marketing, QSuper**
- DARLENE MATTISKE-WOOD, Deputy CEO and Chief Strategy, Marketing and People Officer, People's Choice Credit Union**
- Emma King, Platform Owner - Website & Interactions, AMP**

10:40 MORNING TEA & NETWORKING

11:00 MASTERING TARGETED COMMUNICATIONS AND CONTENT TO IMPROVE CLIENT EXPERIENCE AND SALES

- Using digital to create targeted content and inbound campaigns based on insight to create a personalised client experience
- Understanding the power of language to better connect with audience and enrich the client experience
- Leveraging insights and ongoing research and interpreting success against key metrics



STEVE WHITE, Head of Marketing and Communications, APAC, Gallagher

11:40 BOOSTING ENGAGEMENT AND RETENTION THROUGH INTEGRATING DATA DRIVEN COMMUNICATIONS INTO THE CUSTOMER JOURNEY

- Leveraging analytics to understand the most crucial touch points for your customers
- Linking customer journeys to your marketing/communication strategy and executing the most effective improvements for your customer base
- Personalising your communications: Understanding each customer on an individual level to boost engagement, trust and retention



TOM MCCANN, Principal, Head of Member Experience, Aon

12:20 INTEGRATING ANALYTICS AND MARKETING: FULLY UTILISING INSIGHTS TO IMPROVE CX



- Integrating your social channel to drive engagement and new customers
- Capturing all interactions across multiple channels and monitoring/optimising these in real time
- Personalisation in the onboarding of new customers
- Following and capturing multiple customer journeys

MIKE NIXON, Head of CRM, TAL

1:00 NETWORKING LUNCH

2:00 MASTERING CRM THROUGH FOCUSING ON CLEAR BUSINESS OBJECTIVES AND END-USER EXPERIENCE

- Shifting the focus away from the technology aspect of CRM
- Better understanding process and setting realistic expectations
- Centring your CRM strategy and transformation around business objectives and how the end-user needs it to function
- Effectively integrating data into your CRM to drive value
- Lessons learnt over a 20 year CRM career at various companies: avoiding common recurring issues



NARELLE HOWARD, CRM Leader, Mercer

2:40 IMPROVING DIGITAL MARKETING EFFECTIVENESS THROUGH SMARTER INVESTMENT AND LEARNING

- Using evidence-based decision-making marketing investments
- Smart insights: harnessing marketing insights to make better decisions by moving from reporting to learning
- Avoiding poor media investments to improve value for customers and business outcomes
- Stop spending on what's not working: moving from reporting to empowering marketing teams to learn and improve



ADRIANA ALEKSIC, Head of Product, Defence Health

3:20 AFTERNOON TEA

3:50 THE SECRET BEHIND SUCCESSFUL INNOVATION: DELIVERING SUPERIOR CUSTOMER AND BUSINESS OUTCOMES

- Taking a human-centred approach to business planning and problem solving
- Developing customer propositions and take to market plans that win your customers hearts
- Connecting your employees with your customers
- Driving cultural change through new ways of working



ANITA AYRES, Head of Innovation, First State Super

4:30 THE POWER OF STORYTELLING TO WIN AT DIGITAL MARKETING AND THE IMPORTANCE OF CREATIVE TO COMPETE

- Turning your marketing team into story factory/ad agency with design, storytelling, tech and community building to enable meaningful and hard-hitting content
- Structuring your team based around storytelling and specialisation of skills: creating a high functioning team and placing the right skills in that structure to all plug in and deliver a concept
- Getting the balance of talent right and creating a collaborative ecosystem
- Increasing your competitiveness through integrating specialists into your teams



GRACE PALOS, CMO, Future Super

4:30 CLOSING REMARKS BY CONFERENCE CHAIR

4:40 CONFERENCE CLOSED

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