

THE FINANCIAL BRAND

November 13-16 | Las Vegas | Forum2022.com

FORUM



PIXAR

Southwest

SHARK
TANK



NBC



Disney

Experience the world's most elite conference on marketing, CX and digital transformation in the banking industry.

Join more than 2,750 senior-level executives and C-level decision-makers from more than 900 of the most progressive and respected financial institutions on earth at **The Financial Brand Forum** — three days loaded with big ideas, actionable insights, and best practices.

The **Forum 2022** is specifically engineered to help you tackle the critical challenges you face. Learn from the best and brightest experts in retail banking, as they reveal the big ideas, latest innovations, and best practices that are transforming financial services today.

Final Discount



**SAVE
\$1,100**

**HURRY, ENDS
THURSDAY
SEPT. 15TH!**

Banks and credit unions that register now **save big** and get a free **Gold Pass** upgrade worth \$770, including access to video recordings of all sessions and a **free ticket** to see **Jay Leno's private performance** for Forum attendees.

Forum 2022 Highlights

Forum X

Notable experts and thought leaders give the talk of their lives in this series of short, high-level strategic presentations focused on helping you prepare for the future. It's like **TEDx** for financial institutions!



Invaluable Networking

Looking to expand your team? Need a new solution provider? Exchange ideas and insights with 2,750+ of the brightest minds in banking from 900+ of the world's most progressive institutions.

Access To Forum+ Video Library

Attendees with a **Gold Pass** get access to the **Forum+** on-demand video channel with video recordings of all keynotes and breakouts so they can watch everything again when they get home!



Digital USB Toolbox

Every attendee receives a 2GB flash drive loaded with digital copies of all session slides, plus dozens of valuable white papers, research reports and eBooks.

Free Lattes & Cappuccinos

Enjoy complimentary **Starbucks** espresso beverages, served right inside the **Forum 2022** exhibit hall — no wasting time finding that morning caffeine fix!



Guaranteed ROI

If you don't come away with new ideas that build your brand and your bottom line, you can have your money back.



Available to all **Gold Pass attendees!**

On-demand video streaming channel

All Forum 2022
keynotes and breakouts*

100+
how-to sessions and educational presentations

Fresh insights from the industry's best and brightest — speakers like Gary Vaynerchuk, Barbara Corcoran, Guy Kawasaki, and countless experts from around the banking world.

Forum 2022 Schedule



To get the most out of the **Forum 2022**, we recommend you book your stay at the **Aria Hotel & Resort** in Las Vegas starting the night of **Sunday, November 13th** so that you don't miss the workshops, the hosted grand opening reception, **Jay Leno's private show**, and Monday's keynote with **Magic Johnson**. We also recommend you book your stay through Wednesday night, checking out **Thursday, November 17th**.

SUNDAY NOV 13

- 8:00 AM** Registration Desk Open
- 5:00 PM** Grand Opening Reception
- 7:00 PM** Live Entertainment



More details and updates available online

[ONLINE SCHEDULE](#)



MONDAY NOV 14

- 7:00 AM** Registration Desk Open
- 7:30 AM** Networking Breakfast
- 9:00 AM** **Opening Keynotes:**



- 10:30 AM** Concurrent Breakout Sessions, Panels & Demos
- 11:30 AM** Networking Luncheon
- 1:00 PM** Concurrent Breakout Sessions, Panels & Demos

4:00 PM **Featured Keynotes:**



- 5:00 PM** Networking Reception

TUESDAY NOV 15

- 7:00 AM** Registration Desk Open
- 7:30 AM** Networking Breakfast
- 9:00 AM** **ForumU**



- 10:30 AM** Concurrent Breakout Sessions, Panels & Demos
- 11:30 AM** Networking Luncheon
- 1:00 PM** Concurrent Breakout Sessions, Panels & Demos

4:00 PM **ForumX**



- 5:00 PM** Networking Reception

WEDNESDAY NOV 16

- 7:00 AM** Registration Desk Open
- 7:30 AM** Networking Breakfast
- 9:00 AM** **Featured Keynote:**



9:45 AM **Leadership Summit:**



- 11:30 AM** Networking Luncheon
- 1:00 PM** **ForumX**



2:00 PM **Closing Keynote:**



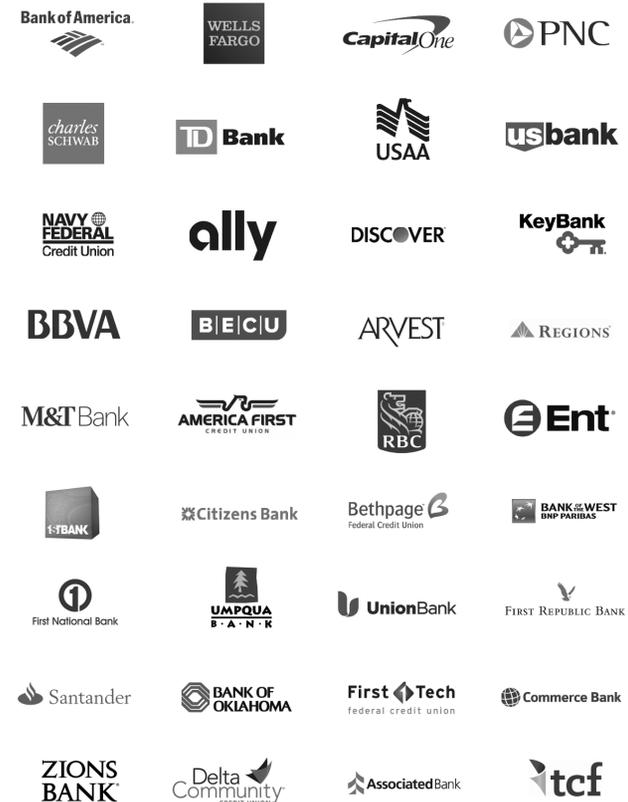
Forum 2022 Who Attends

2,750+
TOTAL NUMBER OF
PROJECTED ATTENDEES

900+ DIFFERENT FINANCIAL
INSTITUTIONS



1 IN 20 OF ALL BANKING
PROVIDERS IN THE U.S.
ATTEND THE FORUM



Forum 2022 Who Attends

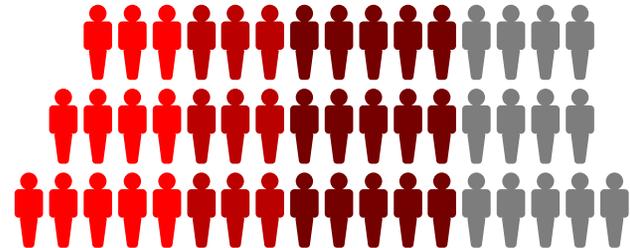


MORE THAN
1 IN 5

ATTENDEES ARE
DECISION-MAKERS
IN THE C-SUITE

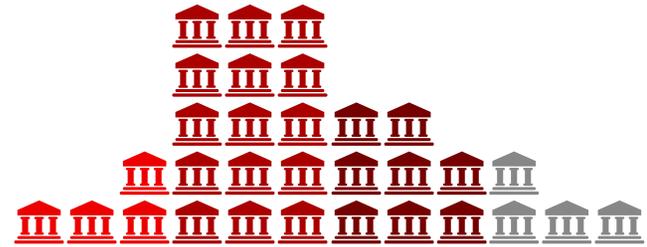


OF ATTENDEES WORK AT A
RETAIL FINANCIAL INSTITUTION



C-SUITE	EVP & SVP	VICE PRESIDENT	MANAGER OR DIRECTOR
22%	16%	31%	24%

Title & Level



OVER \$10 BILLION	\$1 BILLION TO \$10B	\$500M TO \$1 BILLION	\$250M TO \$500M
15%	49%	18%	14%

Asset Size



1 OUT OF 3

OF THE 1,000 BIGGEST BANKS
IN THE U.S. ATTEND THE FORUM

2 IN 3

ATTENDEES HAIL FROM
AN INSTITUTION WITH
OVER \$1 BILLION IN ASSETS

Most common attendee titles

- **CMOs, CEOs and COOs**
- **EVPs and SVPs**
- **Vice Presidents**



KEYNOTE SPEAKER

Magic Johnson

Legendary **NBA Hall of Famer**, Five-Time **NBA Champion**, **Business Mogul** and **Entrepreneur**

Basketball legend turned entrepreneur **Earvin “Magic” Johnson** is one of the most influential figures in the world and among the most successful businessmen in America.

He is one of the greatest players in **NBA** history, with three **MVP Awards**, 12 All-Star appearances, and five championships with the **LA Lakers**.

Today, he is the CEO of Magic Johnson Enterprises, a \$1 billion conglomerate that has managed a strategic portfolio of companies with over 30 **Burger King** franchises, more than a dozen **24-Hour Fitness** clubs, 105 **Starbucks** locations, shopping centers, movie theaters, commercial real estate investments, and a venture capital division.

At the **Forum 2022**, Magic Johnson will draw on his business acumen, management principles, and commitment to innovation as he teaches you his winning game plan.





SUNDAY ENTERTAINMENT

Jay Leno

Late-Night Comedy Legend
and host of **The Tonight Show**

Spend an unforgettable evening with America's favorite late-night talk show host at a private comedy performance exclusively for **Forum Gold Pass** attendees

Following tremendous success as a stand-up comedian, Jay Leno hosted **NBC's The Tonight Show** for nearly two decades and has been a celebrity fixture in American living rooms for over 30 years.

This is your chance to see Jay Leno live, in person, and kick the conference off with a bang! Register for the **Forum 2022** now to get a **Gold Pass** including your free ticket to see Jay's private show opening night — Sunday, November 13th at 7:00 pm. A handful of lucky attendees will be selected to meet Jay and snap selfies backstage after the show! **But hurry, space is limited and time is running out!**



Private Performance
opening night exclusively for
Forum Gold Pass attendees



KEYNOTE SPEAKER

Daymond John

Co-Host of **Shark Tank**, Celebrity **Business Investor**,
Founder of FUBU, and **NY Times Best-Selling Author**

From his wildly successful role on **ABC's** smash hit **Shark Tank**, to his roots as the entrepreneurial genius behind the **FUBU** lifestyle brand, **Daymond John** is universally recognized as one of the world's most distinguished marketing experts, working with the biggest names on the planet — from **Capital One** and **Miller Lite**, to superstar celebrities including the **Kardashians** and **Pitbull**.

In this dynamic, high-energy keynote loaded with actionable advice and practical takeaways, Daymond uses powerful examples from his phenomenal rags-to-riches journey to teach you the secrets that fueled his success — a potent combination of grit, relentless determination, and the power of branding.

Daymond will show attendees how to outperform, outwork and out hustle their competition by building a culture around a brand strategy that inspires out-of-the-box thinking, and instills infectious energy that flows throughout the organization.

**SHARK
TANK**

KEYNOTE SPEAKER **TEDx**
SPEAKER

Omar Johnson

Former VP/Marketing of **Apple**
and CMO of **Beats by Dre**

As CMO and one of the first three employees at **Beats**, **Omar Johnson** lead brand development, advertising, retail CX, and digital marketing, where he drove explosive growth — helping build a \$1.1 billion dollar global icon and category leader.

In 2018, **Adweek** named him a “Brand Genius”, and in 2016 **Business Insider** distinguished him as one of the world’s “Most Innovative CMOs”.

At the **Forum 2022**, attendees will learn how Omar leverages creative marketing strategies to build brand awareness for the world’s most recognizable companies — from **Apple** and **Nike**, to **Coca-Cola** and **Kraft** — and how banking providers can incorporate similar guerilla techniques to build market share.

KEYNOTE SPEAKER **TEDx**
SPEAKER

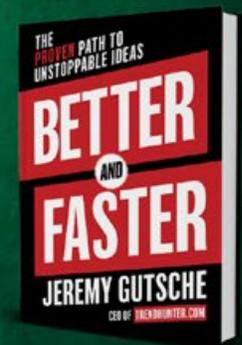
Jeremy Gutsche

**Futurist, CEO at Trend Hunter and
NY Times Best-Selling Author**

As CEO of **Trend Hunter**, the world's #1 innovation website and trend-spotting firm, **Jeremy Gutsche** is one most respected authorities on innovation and change management on the planet.

Google, Netflix, Disney, Starbucks, Wells Fargo, Coca-Cola, Victoria Secret and **IBM** all tap his expertise to accelerate innovation, respond to trends, and take their organizations to the next level. MTV touts Gutsche as a futurist "on the forefront of cool," and he's even helped NASA prototype their journey to Mars.

Jeremy's mind-blowing interactive multimedia keynote at the **Forum 2022** will arm you with big picture takeaways and practical steps showing you how to adapt to the macroeconomic forces and megatrends that are reshaping banking and the world around us.



TRENDHUNTER™

KEYNOTE SPEAKER

TEDx
SPEAKER

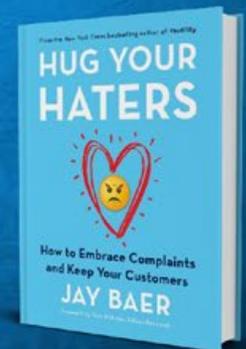
Jay Baer

Digital Marketing Expert, Author of
6 Best-Sellers, and CX Strategist for
the World's Most Iconic Brands

Banks have always had plenty of haters. But thanks to digital channels, it feels like the volume of complaints is growing louder.

In this eye-opening presentation, you'll see how the rise of customer complaints is actually an enormous opportunity, as **Jay Baer** reveals proprietary research behind "The Science of Complaints."

You'll learn why and where customers complain, and how to turn negative feedback into a massive marketing advantage. Jay will teach you the critical steps necessary to delight and retain today's banking customers in a hilarious and interactive keynote that will forever alter the way you think about the intersection of CX, marketing, sales, and operations.





KEYNOTE SPEAKER

ROSS Shafer

**Author, Business Expert, and
6-Time Emmy Award Winner**

Ross Shafer is a six-time Emmy Award winning comedian and writer, hosting five different hit TV shows on four networks — **ABC, NBC, USA, and Comedy Central**. The author of 11 best-selling business books and expert on leadership, change management, organizational growth, customer service, and CX, Shafer coaches senior executives at 73 different companies in the **Fortune 100**.

This hilarious and unconventional keynote speech will reveal the gaps between corporate CX strategies vs. what consumers really want and the actual experience brands deliver. Drawing on emerging trends in the science of consumer psychology, Shafer will explore the importance of relevancy, engagement and customer empathy in any bank's branding and growth strategies.

LEADERSHIP SUMMIT SPEAKER



TEDx
SPEAKER

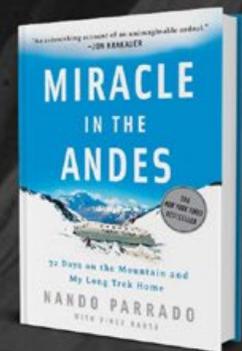
Nando Parrado

NY Times Best-Selling Author, Andes Plane Crash Survivor, and Inspiration for the Movie “Alive”

In October 1972, a plane carrying a rugby team from Uruguay crashed into the remote **Andes Mountains**. The ensuing struggle for survival became one of the most astounding stories in human history.

After enduring unimaginable conditions for two months, **Nando Parrado** and teammate Roberto Canessa spent 11 days climbing through miles of rugged snow and ice before reaching help and rescuing the 16 others still trapped on the mountain. This incredible odyssey inspired the 1993 feature film **Alive**, in which Parrado was played by **Ethan Hawke**.

Nando now aims to inspire others by sharing the lessons he learned — how to respond to conflict, manage crises, and make tough decisions to overcome inconceivable challenges. This unforgettable keynote is a lesson in strategic leadership and tactical planning for banks struggling to survive, illustrating the power of ingenuity, adaptation, and perseverance.





LEADERSHIP SUMMIT SPEAKER



TEDx
SPEAKER

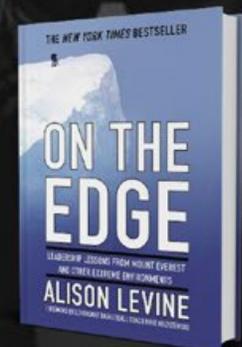
Alison Lavine

Everest Mountaineer, Polar Explorer
and NY Times Bestselling Author

As a polar explorer and Everest expedition leader, **Alison Levine** knows what it takes to survive and thrive in the world's toughest environments. She's not only scaled the tallest mountains in all seven continents, she's spent 20 years in sales and marketing climbing the corporate ladder on **Wall Street**.

At the **Forum 2022**, Alison will draw on her experience in management and as a mountaineer to offer a unique perspective on leadership, with practical advice about dealing with unpredictable situations and taking risks.

One of today's most dynamic and entertaining speakers, Alison combines inspirational stories with breathtaking visuals to demonstrate the parallels between staying alive on the world's most dangerous peaks and succeeding in today's business world — where determination and willpower are essential to survival.



Duncan Wardle

Former Head of Innovation & Creativity at **Disney**, and Innovation Professor at **Yale University**

Embedding Innovation Into Your Culture's DNA

Duncan Wardle spent 25 years developing innovative ideas and strategies for **Walt Disney**, leading the creative process for teams at **LucasFilms, Pixar, Marvel, Disney Parks** and **ESPN**.

Duncan has shared his unique **"Innovation Toolkit"** with thousands of employees at **Fortune 500** companies — e.g., **Apple, Ford, Coca-Cola** and **Forbes** — showing them how to strategically and repeatedly create moments of innovation.

In this special **Forum U** session, you will learn Duncan's "Innovation Toolkit", so you can teach your team how to develop their own innovation "light switch" and overcome problems with creative ideas. You'll learn how to drive cultural change with new tools that can transform anyone into an innovative leader.



Suneel Gupta

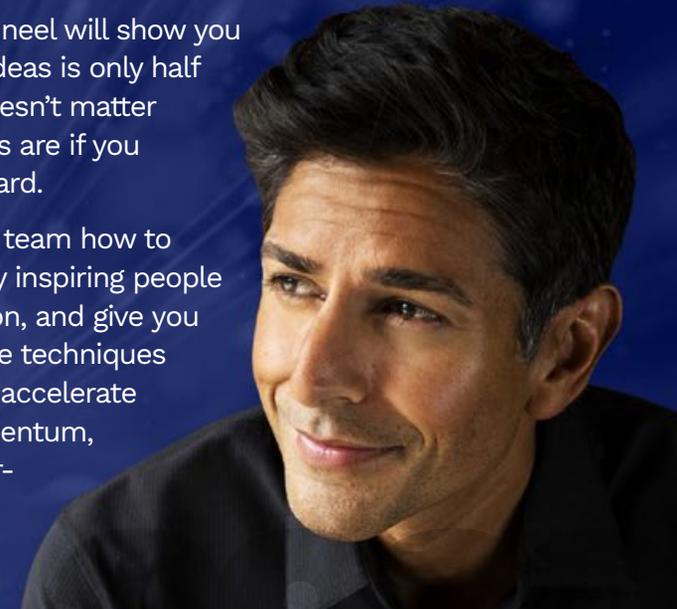
Best-Selling Author and Professor of Digital Strategy at **Harvard University**

Backable: Getting People to Believe In Your Ideas

Suneel Gupta is an expert at accelerating growth and innovation. In less than two years, Suneel helped grow **Groupon** from a tiny startup into a multi-billion dollar company, and he has personally backed some of the most successful and innovative startups on the planet, including **AirBnB, 23&Me, Calm**, and **SpaceX**.

At the **Forum 2022**, Suneel will show you how coming up with ideas is only half the battle — that it doesn't matter how brilliant your ideas are if you can't get others on board.

Suneel will teach your team how to move ideas forward by inspiring people with a captivating vision, and give you immediately actionable techniques to spark engagement, accelerate innovation, build momentum, and manage the hyper-growth that follows.



Forum X

Notable experts and industry thought leaders give the talk of their lives in 18 minutes.

These high-level strategic presentations focus on preparing you and your organization for the future.

It's like **TEDx** for banking.

FORUM X SPEAKER

TEDx
SPEAKER

Ginger Hardage

Former SVP of Culture & Communications at **Southwest Airlines**

Unstoppable: Creating & Sustaining Organizations With Enduring Greatness

Ginger spent 25 years spearheading internal culture at **Southwest**. Her unwavering dedication to building and sustaining the organization's legendary reputation earned the airline the distinction as one of Fortune's "**Top 10 Most Admired Companies in the World**".

She is recognized as one of the world's foremost authorities on building and sustaining organizational culture, and was selected as one of the "**Top 50 Most Powerful Women in Public Relations**" by **PRWeek**. In 2015, she was inducted into the Public Relations Hall of Fame.

At the **Forum 2022**, Ginger will tell you how to overcome the internal hurdles holding your organization back by creating your own innovative culture with inspiring new, never-been-done-before ideas.

Southwest 



FORUM X SPEAKER **TEDx**
SPEAKER

Matt Luhn

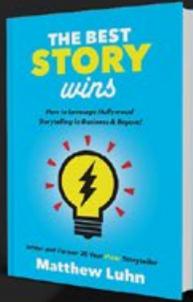
Former Lead Storyteller at **Pixar**

Inspiring Creativity

With over 25 years of experience as one of Pixar's most distinguished storytellers, Matthew Luhn is a master at creating dynamic narratives that engage audiences. His creative credits include **"Toy Story"**, **"Monsters Inc."**, **"Finding Nemo"**, **"Cars"**, and **"The Simpsons"**.

Matthew's engaging and action-oriented **Forum X** talk will provide attendees with practical strategies and show you how to create a culture that encourages and nurtures new ideas. He will demonstrate how to empower relationships and build trust through authentic communication. Senior leaders will learn how to inspire their teams by leveraging the persuasive power of great storytelling, and how to bridge the gap between the heart and business, driving your brand's story toward one unforgettable selling point.

P I X A R



FORUM X SPEAKER **TEDx**
SPEAKER

Shama Hyder

Marketing Expert, Best-Selling Author
and CEO of **Zen Media**

Momentum: How to 10X Your Brand

Shama Hyder is a visionary strategist for the digital age, a TV personality, and web celebrity. She has been named one of **Business Week's "Top 25 Entrepreneurs,"** and has been listed among **LinkedIn's "Top Voices in Marketing & Social Media"** three years in a row. **Entrepreneur** magazine describes her as the **"Zen Master of Marketing,"** while **Fast Company** dubs her the **"Millennial Master of the Universe."**

In Shama's **Forum X** presentation, she will show banking executives how to 10x their brands by leveraging the latest techniques to consistently engage the right audience — from experiential marketing and online influencers, to digital storytelling. You'll learn the modern-day strategies global brands like **Chase Bank** and **MaryKay** use to create digital momentum and achieve their business objectives.

Z E N M E D I A



FORUM X SPEAKER

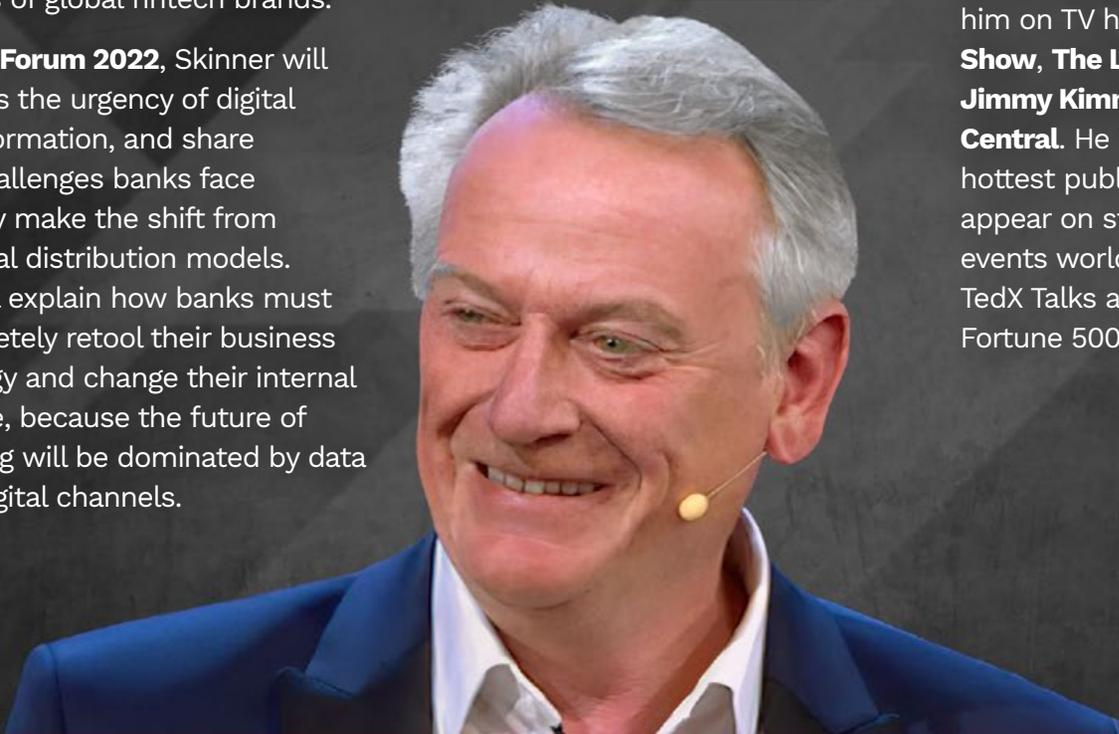
Chris Skinner

Fintech Legend, Best-Selling Banking Author,
and CEO of **TheFinanser.com**

The Digital Bank of Tomorrow

Chris Skinner is one of the most authoritative and respected voices in the banking world. He has served as an advisor to the **White House**, the **United Nations**, the **World Bank**, and the **World Economic Forum**, with the **Wall Street Journal** declaring him among the most influential people in financial technology. Skinner has authored three bestselling books, lectures at **Cambridge University**, and has served on boards of global fintech brands.

At the **Forum 2022**, Skinner will discuss the urgency of digital transformation, and share the challenges banks face as they make the shift from physical distribution models. He will explain how banks must completely retool their business strategy and change their internal culture, because the future of banking will be dominated by data and digital channels.



FORUM X SPEAKER

TEDx
SPEAKER

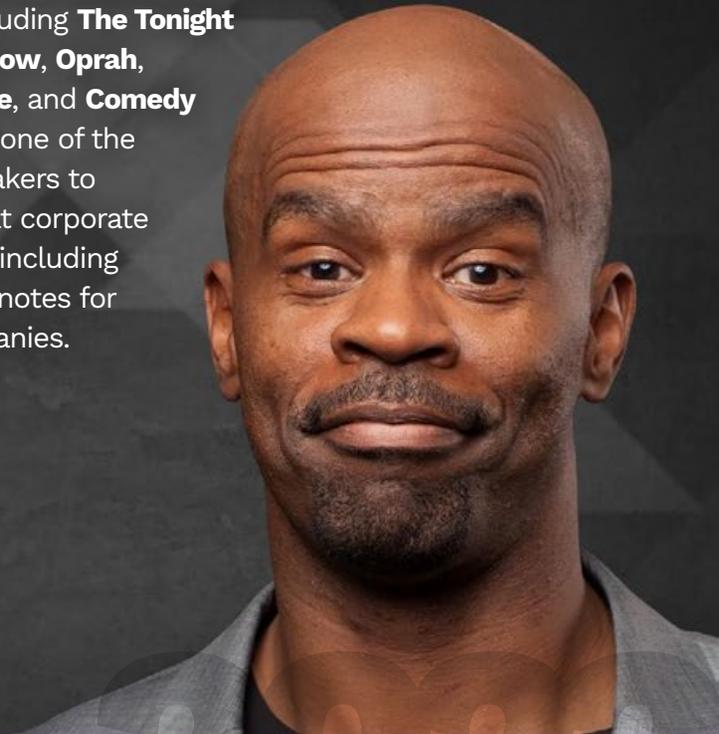
Michael Jr.

Motivational Comedian/Film and TV Star

Laughing All the Way to the Bank (Crying on the Way Home)

Exceptionally gifted at combining story with thought-provoking life principles, **Michael Jr.** exhibits what it means to be a comedic thought leader. Using comedy and dynamic storytelling, he brings laughter and encouragement to audiences all over the world.

Known as one of today's most gifted comedians, he tours the country using comedy to inspire and engage audiences. His impactful delivery and versatility has landed him on TV hits including **The Tonight Show**, **The Late Show**, **Oprah**, **Jimmy Kimmel Live**, and **Comedy Central**. He is also one of the hottest public speakers to appear on stages at corporate events worldwide, including TedX Talks and keynotes for Fortune 500 companies.



How-To Strategy Sessions

Building Your 2023 Strategic Plan: The Secrets of High-Performing Banks

Dr. Sean Payant

Senior EVP and Chief Strategy Officer at **Haberfeld**



What do high-performing banks do differently? Where do they focus? Do they perform better in every category? Or do they actually underperform in certain categories in order to dramatically outperform in others? The answers to these questions are critical as you build your growth strategy for 2023 and beyond.

In this session, Dr. Payant takes a deep dive into performance data to reveal the secrets underpinning the strategic plans at high-performing banks. You'll see why some banks consistently rank in the top 5% for ROE year after year, with surprising insights into what these top performers know that their competitors don't.

This session will teach banking executives:

- How to evaluate the elements of high-performing banks, and how they achieve jaw-dropping results
- The most critical strategies that yield maximum impact on performance metrics
- Consistent and proven approaches you can use to accelerate growth and outpace your competition
- How to identify and implement actionable strategies that significantly increase recurring non-interest income

7 New Strategies that Instantly Improve Bank Marketing ROI

Nancy Harhut

Chief Creative Officer at **HBT Marketing**



Financial marketers need every possible bit of return from each dollar you spend, and that means business as usual isn't an option.

Backed by behavioral science and proven through market research, these seven surprising strategies reveal exactly how to craft marketing messages that motivate consumers to take action.

In this session, you'll discover new ways to phrase your offers for optimum impact, the best strategies to overcome inertia, and two strategies critical to success. Includes numerous creative examples from multiple verticals, including financial services. You'll arm yourself with hyper-effective tactics you can easily add to your current and future campaigns in order to make them more powerful – and profitable.

This session will teach banking executives:

- Seven easy-to-use power tactics that you can apply immediately to make your marketing campaigns more successful
- The secret techniques, tweaks and best practices that fine tune your marketing messages so they outperform the competition
- How to incorporate consumer psychology into your marketing campaigns, and the psychological triggers that drive consumers' decisions
- How to leverage the surprisingly persuasive principles of behavioral science, including the impact of the "Motivating Uncertainty Effect," "Rhyme as Reason Bias," and much more!

How-To Strategy Sessions

Innovative Digital Marketing Strategies for Acquisition, Growth & Retention



Lincoln Parks

Digital Marketing Expert & Banking Thought Leader

The digital revolution is forcing CMOs to integrate new technologies that refine segmentation models, deliver personalized offers in real time, automate processes, streamline the customer experience, and translate valuable data into actionable intel.

This session will show bank and credit union marketing leaders how to accelerate innovation, increase the pace of change, and roll out new digital banking solutions faster. Learn new strategies and how-to insights exploiting disruptive technologies to succeed in a crowded, competitive and commoditized market. You'll leave armed with best practices and proven strategies to connect with consumers on digital platforms and engage in online conversations that drive bottom line results.

This session will teach banking executives:

- The six pillars essential to the modern digital marketing strategy
- The formula and strategic framework for predictable growth, with tools and tactics that support actionable metrics
- Solutions and new technologies that improve conversions, reduce acquisition costs, and increase sales
- When and where to leverage marketing tools like SEM, geofencing and social media content along the customer journey to create brand awareness and move consumers to purchase
- How data analytics and AI can help maximize your digital marketing ROI and achieve your business objectives faster

Engineering the Optimal Digital Lending Experience: Fast, Frictionless & Fully-Automated



Devesh Khare

Chief Product Officer at **MeridianLink**

The future of lending will be dominated by Millennials and Gen Z who increasingly expect their banking providers to deliver “Amazon-like” experiences. These borrowers want a fully-contactless digital lending process — from streamlined digital applications, to fast, automated AI-powered loan decisions.

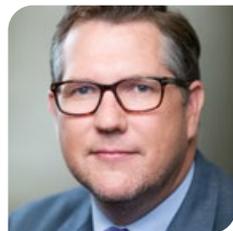
In this session, you'll learn how to deliver a world-class, omnichannel digital lending experience that's fast, responsive and frictionless. You'll see the best practices and industry trends and shaping digital lending strategies in the banking industry today.

This session will teach banking executives:

- The three main pillars of a successful digital lending strategy
- The essential components needed to deliver a frictionless end-to-end digital lending experience
- How to completely automate and digitize each step in the digital lending journey
- How to originate and process loans faster while mitigating risks and managing compliance requirements
- How to increase operational efficiencies, streamline workflows, and reduce costs

How-To Strategy Sessions

Beyond Traditional Banking: Innovative Digital Banking Models & New Growth Strategies



Jeffery Kendall
CEO/Founder at **Nymbus**

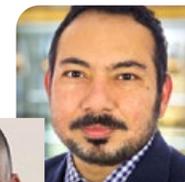
Facing an onslaught of competitive pressures, traditional financial institutions are being squeezed in every direction — from revenues and profit margins, to market share and adoption rates. Banking executives have been forced to reevaluate long held assumptions as they completely rethink their acquisition and growth strategies.

This session will show banking providers the way forward, with the innovative digital acquisition strategies they need to attract, engage, and expand relationships with both consumers and businesses. You'll learn how to overcome stagnant growth trends and transform your organization's current operating model to protect eroding margins and generate new revenue streams.

This session will teach banking executives:

- Four different go-to-market models that can serve as the foundational framework for any digital banking growth strategy
- Alternatives to traditional retail delivery models and branch-based network strategies
- How to build the blueprint for a niche strategy that expands your digital footprint
- Strategies to increase market share by targeting affinity segments
- How to leverage data to identify new addressable markets and untapped growth opportunities
- How digital banks like Chime create value by seeking alternative routes to growth and leveraging models that differentiate their brand
- The importance of quantifying each customer's potential lifetime value (LTV) when crafting your digital banking strategy

CX Strategies to Humanize Banking in the Digital Age



Dipanjan Chatterjee
Principal Analyst/Financial Vertical at **Forrester**



Peter Wannamacher
VP/Principal Analyst at **Forrester**

The best financial brands of the future will seamlessly harmonize digital and human to create differentiated brand experiences. But how do we get there? Can a bank be digital-first without sacrificing the human connection that many customers still value? What interactions can be completely digital, and when do employees need to personally engage with customers? Where do touchpoints like live chat, video conferencing, and contact centers fit into the CX strategy?

This session will show you how to balance the use of digital tools and human engagement to reduce friction, personalize experiences, and simplify the customer journey. You'll learn how to strike the right strategic balance between 'high tech' digital experiences and 'high touch' interactions by combining the strength of humans with the power of technology.

This session will teach banking executives:

- Hybrid CX models combining the best of physical and digital distribution to deliver differentiated customer experiences at scale
- How technology can be used to augment the human experience and empower both customers and employees
- How differentiating with emotion in a digital-first world gives your CX strategy a competitive edge that drives acquisition and energizes your brand
- How to deliver more human experiences in the digital banking channels using sophisticated technologies like artificial intelligence
- Best practices, case studies, and examples from inside the banking industry and other verticals

How-To Strategy Sessions

Revolutionizing Banking CX Through Customer Centricity

Andrea Olson
CEO at **Pragmadik**

TEDx
SPEAKER



Banking providers pour money into “digital transformation.” Unfortunately, the ROI on these investments frequently fall short, allowing fintechs to exploit the gaps between customer expectations and the experience banks deliver.

In this session, behavioral scientist, TEDx speaker, and customer-centricity expert Andrea Olson will show you why financial marketers must put customers at the center of organizational change. Explore consumers’ hidden needs, and learn step-by-step how to fuel a unique new strategy and create a culture that effectively differentiates your institution, builds trust, and grows your brand.

You’ll learn why customer-centricity isn’t as simple as asking customers what they want, and how to leverage data while aligning your CX strategy with customer expectations.

This session will teach banking executives:

- How to dramatically create genuine engagement, yield growth, and improve wallet share with a customer-centric mindset
- How consumers’ experiences in other verticals have radically redefined their expectations in banking, and how your CX strategy needs to shift immediately
- How to optimize internal processes, leverage new technologies, and align your employee culture to engineer experiences built around customers’ expectations
- The pitfalls and shortcomings involved with building growth strategies around CX “journeys”
- New metrics, benchmarks KPIs for evaluating the impact of your customer experience strategy, and why “satisfaction scores” are wholly inadequate
- The newest subscription pricing strategies for financial service products

Data-Driven Growth Strategies: Best Practices That Maximize Banking Relationships

Becky Summers

Strategic Advisor at **Raddon (a Fiserv company)**



All high-performing financial institutions have one thing in common: they use advanced data analytics to achieve their strategic growth objectives — finding and attracting new customers, growing account balances, retaining relationships, and keeping people engaged.

In this session, you’ll learn how to building the right marketing strategy around data-driven insights, including case studies, best practices and multiple examples from within the banking industry. You’ll learn how to create an Amazon-style experience leveraging predictive analytics to determine next-best products, and deliver the right message to the right person at the right time.

This session will teach banking executives:

- Proven data strategies that turbocharge cross-selling, improve household profitability, increase adoption of additional products, and expand wallet share
- How to personalize marketing messages and provide relevant recommendations based on accountholders’ transactions and behaviors
- How to decrease attrition and identify at-risk relationships by looking at data trends for shifts in accountholders’ payment patterns and deposit habits
- How to identify where accountholders have other relationships, which competitors are stealing your accountholders, and the gaps between you and your competitors

How-To Strategy Sessions

Omnichannel Customer Journeys in Banking: Building Roadmaps for Revenue Growth



Christopher Colley

Chief Industry Advisor of Financial Services at **Qualtrics**

To be effective in today's omnichannel world, you need more than just snapshots of interactions in isolated touchpoints. Financial marketers need to understand every aspect of the customer journey — which interactions occur in which channels, and in what sequence.

CX strategies built around customer journeys encompassing all phases of the customer's decision for a banking product are 30% more effective at predicting outcomes than merely measuring conversions in an individual touchpoint.

In this session, you'll see how the best experience managers in banking have optimized their customer journeys to drive revenue growth, with practical steps and tangible lessons from the industry's early adopters.

This session will teach banking executives:

- How today's banking providers are maximizing the value of their CX investments by engineering their experience strategy around customer journeys
- Practical ways to drive greater conversions, multiply repurchase rates, and re-engage at-risk customers and through customer journeys
- How to win when crucial consumer journeys — like mortgage applications — can stretch over several months and involve multiple functions
- How banking providers are rethinking CX metrics and why some measurement frameworks fail to move the needle, and how to avoid common pitfalls
- How to harness the potential of unstructured data sources to identify efficiencies and streamline customer journeys

The Future of Personalization in Banking: AI, Marketing Automation & Transaction Data



Don MacDonald

CMO at **MX**

With rising expectations, a competitive market, and the phase-out of third-party cookies, financial institutions need to find more effective ways of engaging and retaining their customers. But, with legacy tech stacks and closed infrastructures, knowing how to optimize your data and marketing automation strategy to improve customer acquisition and retention can seem out of reach.

During this session, we'll share how you can unlock one of the most underutilized data sets — transaction data. You'll learn how open finance is making data more available and actionable than ever before and how to build a marketing strategy that's personalized and targeted to your customer's financial needs.

This session will teach banking executives:

- How to deliver a more personalized experience that accelerates growth
- How to unlock actionable marketing insights lurking in your customers' transaction data
- How to leverage transaction data and integrate it into your marketing automation and personalization strategy
- Best practices, use cases and how to move the needle and activate your customer base
- Case studies showing how affinity-based marketing can increase ROI

How-To Strategy Sessions

Strategic Marketing and Fintechs: Eliminating Five Critical Blind Spots



Hunter Young
President at **HiFi Agency**
Board Member at **NYMBUS**

With the relationship between fintechs and traditional banking providers rapidly evolving — oscillating frequently between cooperation and competition — the lines between the two have blurred, and the strategic marketing implications are profound. Consumers have become disoriented, and don't know where to turn for advice and guidance. Fintechs or banking providers, and in which channel? This confusion has undermined wider adoption and deeper engagement with digital banking solutions.

This session will cover five key areas that financial marketers need to urgently address to close these communication gaps, eliminate consumers' confusion, and fix the CX breakdowns that have emerged. You'll see how to engineer the right marketing strategy that keeps consumers engaged with your organization's digital banking solutions.

This session will teach banking executives:

- The ramifications of fintech+banking relationships, and their impact on marketing plans, budgets and communications strategies
- How automated platforms, APIs, and AI are depersonalizing customer journeys
- The importance of connecting legacy banking systems with newer martech tools and platforms
- How to turbocharge usage of digital banking tools and cross-channel activations
- A new strategic marketing model — fast and agile marketing, with opportunities for critical experimentation.
- How to respond to the changing digital expectations and behaviors by crafting a marketing communications strategy that resonates with today's banking consumers and businesses

Creating Data-Driven Financial Brands That Thrive in The Experience Economy



Betty Moon
Senior Principal/Financial Services Industry at **SAP**

With consumer demands intensifying at a breakneck pace, financial institutions of all sizes struggle to attract, retain and grow relationships. But meeting these challenges goes way beyond marketing initiatives. In the digital-first world, banking providers must rethink everything about their business models.

Today, financial institutions must deliver a new and exceptional customer experience, supported by new technologies — from AI and advanced analytics, to open platforms and the cloud. In this session, you'll explore revolutionary new customer, employee, product, and brand experiences that are differentiating banking brands, increasing customer engagement, and driving increased loyalty.

This session will teach banking executives:

- How financial institutions across the globe utilize new technologies to improve customer loyalty, retention, and revenue
- How to reshape banking distribution models by deeply understanding your customers through real-time data, machine learning, and smart automation
- Three CX myths that can destroy your brand, and how to move beyond them

How-To Strategy Sessions

Transforming Financial Wellness Programs Into Revenue-Generating Business Strategies



Laura Barger

CMO at the **Financial Health Network**

Financial health initiatives in banking are rapidly evolving from their feelgood CSR roots to become true C-suite level strategic programs. Why? Because the connection to positive business results is clear. Not only can banking providers increase customers' long-term value, many are leveraging their financial wellness programs for marketing to attract and retain relationships.

This session will widen the aperture banking executives use to view the subject of financial health, and how best to deploy your initiative to benefit customers, employees and the organization alike.

This session will teach banking executives:

- How to supercharge your financial education initiatives to fuel growth
- How to create a competitive edge with an authentic financial health brand, with case studies emphasizing institutions that have made financial wellness part of their core business strategy
- How to measure and quantify tangible KPIs as you expand your financial health umbrella
- A playbook with best practices — including product design, progressive messaging, promotional marketing and communications

Gen CX: The Future of Customer Experience



Sue Woodard

Fintech Evangelist & CX Expert at **the STRATMOR Group**

Today's consumers have the power to fracture every aspect of their financial lives. They can parcel out individual slivers of their banking relationships across various providers based on the experience each delivers. That's why everyone in banking is now laser-focused on elevating their customer experience.

This session will show you how to meet the expectations of today's post-pandemic "Gen CX" consumers. You will learn clear ways to increase brand loyalty, improve satisfaction, and win the CX battle with every interaction.

This session will teach banking executives:

- The three most important things Gen CX consumers are looking for in a financial partner, and the strategies and tactics you can use to respond to each of those needs
- Why frictionless customer journeys are so important, and how to use data as the basis to build them
- How to identify key "Moments that Matter" in the customer journey, and how to turn them into "Moments of Magic"
- The right communications strategies for customers depending on where they are in their journey

How-To Strategy Sessions

Financial Brand Makeover Keys to Strategic Brand Differentiation & Awareness

Josh Streufert

Principal at **Strum Agency**

Karen McGaughey

Principal at **Strum Agency**

Marci Francisco

Chief Experience Officer at **Premier America CU**



Get a front row seat into the brand transformation journey of a real financial institution — a rare opportunity see what worked and what didn't as Premier America implemented an expressive branding strategy based on brand values and market resonance. You'll learn how they identified the true character and core principles that drive their brand strategy, as they fight for brand distinction in one of the most highly competitive banking markets in the United States.

This unique session will show you how others overcome the same internal pitfalls and cultural challenges when tackling entrenched beliefs in pursuit of a powerful and differentiated brand strategy.

This session will teach banking executives:

- What it takes to create, evaluate, and refine a differentiated brand strategy in today's hyper-competitive financial sector
- Secrets to gaining buy-in and building consensus among impassioned internal stakeholders holding diverse (and sometimes conflicting) points of view
- How to avoid the biggest and most common branding mistakes, pitfalls and road blocks that prevent financial institutions from building a distinctive brand
- The trials, challenges, and successful outcomes involved with aligning culture, purpose, values, and future goals
- The fundamental steps required to build the right brand strategy, and what you need to do to prepare for your next branding initiative
- How bold storytelling captures brand attention in a crowded market

Strategies to Build Banking Brands that Drive Growth

Gina Bleedorn

Chief Experience Officer at **Adrenaline**



Whether your growth plans focus on M&A, digital banking models, or branch network expansion, it's never been more critical to have a powerful brand strategy that supports your objectives and maximizes the true value of your initiatives.

This session explores six critical considerations for growth-focused brands, and the decision-making framework financial marketers must deploy to craft a strategy that turns their brand into a catalyst for new- and adjacent market growth. Drawing on real-world case studies and best practices in the industry, you'll learn how to create brand differentiation that gives you a competitive advantage and drives growth.

This session will teach banking executives:

- How to identify and amplify the strengths of your brand's DNA, and evolve the core elements of your brand to support growth goals
- How to create brand alignment and an employee culture that delivers the customer experience necessary to fuel growth
- The importance of brand architecture in mergers and acquisitions, and how to minimize customer attrition with the right brand strategy
- How to and foster advocacy and spark chemistry between your brand and your key constituencies — board directors, investors, employees and customers

Digital Banking Showcases

Beyond Disruption: The Future of Fintech



DIGITAL BANKING SHOWCASE



Jeremy Quainoo

Country Operations Director at **Jumo**

Buckle up for a whirlwind tour looking at the future of fintech in this digital banking showcase, as you explore the emerging trends, new technologies, and radical innovations that have massive potential to disrupt the banking sector in the next 5-10 years.

This eye-opening session looks at the coming wave of disruptive catalysts in the financial world, as fintech expert Jeremy Quainoo paints a bold vision of the future and what's possible, showing you new tools, platforms, and products with real potential to completely transform the banking industry as we know it.

See how the next generation of fintechs will pioneer a new wave of disruptive catalysts in the financial world, with revolutionary applications for blockchain, crypto, NFTs, Web 3.0, the metaverse... and what comes next.

This session will teach banking executives:

- What lies beyond the disruptive forces currently rocking the banking world today, and what comes next
- The opportunities, potential use-cases, and possible applications for innovative new technologies in the financial sector
- How emerging technology trends will change consumer behavior, habits, and expectations, and the potential impact of these changes on today's banking providers
- How today's banking executives need to prepare for the future, and proactively innovate to stay ahead of the curve

The Best of Mobile CX and Fintech Apps



DIGITAL BANKING SHOWCASE



Dave DeFazio

Partner at **Strategy Corps**

Fintech apps are taking the banking industry by storm over the minds of today's consumers, and changing the definition of financial advice.

See live demonstrations of today's most popular fintech apps and banking tools, including live demos of over a dozen top platforms — from SoFi and Robinhood, to Affirm and Cash App — to understand the new features that are radically amplifying competitive pressures in the financial services industry. We'll share ongoing research explaining the trends, including which mobile features matter most to each generation, from Gen Z to Boomers. You'll learn how fintech companies like Acorns are pioneering new recurring revenue generating models for financial products and services by leveraging subscription models like Amazon Prime or Netflix.

This session will teach banking executives:

- How leading fintech apps are using data in unique ways to create new categories of banking products
- How new features from fintech apps are expanding the definition of financial advice
- How the biggest banks are changing their products to respond to the evolving fintech threat
- The newest subscription pricing strategies for financial service products

Digital Banking Showcases

Critical Onboarding & Cross-Selling Strategies to Maximize Digital Banking Relationships



DIGITAL BANKING SHOWCASE

After a banking provider acquires a new customer, what happens in the days and weeks that follow has a massive impact on their long-term profitability. This high-impact showcase includes a collection of case studies showing you how the best financial marketers are using digital channels to improve the effectiveness of their onboarding and cross-selling initiatives. You'll see how financial institutions are leveraging digital communications and building a powerful onboarding strategy that deepens engagement, builds share of wallet, improves retention, increases loyalty and accelerates the profitability of new customers.

This session will teach banking executives:

- Best-in-class examples showing the cadence and sequence of communications financial institutions use to welcome, onboard, and cross-sell new customers
- Proven integrated marketing and cross-channel communication strategies, including in video, mobile, SMS/text, direct mail, and more
- How to increase broader usage of new accounts and increase adoption of sticky services, including mobile banking, bill pay, direct deposit, mobile deposit, account alerts, and rewards programs
- How successful cross-selling hinges on delivering the right offers at the right time with personalized offers and contextual marketing messages
- How smart financial marketers move new customers from the 'Engagement' stage to the 'Relationship' stage and ultimately to the 'Loyalty & Advocacy' stage of the life cycle

Best Practices to Maximize ROI in Digital Marketing Channels



DIGITAL MARKETING SHOWCASE



Wil Reynolds

CEO/Founder at **Seer Interactive**

Financial marketers now allocate over 70% of their budgets to digital marketing channels. But how much of this money is wasted?

This session will show you all the latest tools and advanced techniques that every banking provider needs in their marketing arsenal. Learn the critical growth strategies today's most sophisticated marketers are using to turbocharge their results in digital channels — from Google search to social media advertising.

This session will teach banking executives:

- Wildly effective marketing strategies that will radically amplify your ROI in digital channels
- Best practices to generate more clicks for less and maximize conversions
- How to avoid the biggest — and most common — digital marketing mistakes banks are making today
- How to outsmart competitors who outspend you in digital marketing channels
- How to use data to see around corners the other guys miss, and capitalize on critical opportunities they overlook

Digital Banking Showcases

How Open Banking APIs and Banking-as-a-Service Are Transforming the Financial World



OPEN BANKING SHOWCASE

Ritesh Jain, Ph.D

Former COO, CTO, Global Head of Digital Technology at **HSBC**

Open banking has become a major driver of digital transformation across the financial sector, revolutionizing payments, lending, investments, and transactional ecosystems almost overnight.

In this unique digital banking showcase, you'll see how open banking technologies are creating exciting new opportunities to reach new markets with new products. You'll see how APIs are generating new revenue streams and rapidly expanding distribution models, with examples from financial institutions of all sizes.

This session will teach banking executives:

- How traditional banking providers are deploying open banking tools to cross-sell new products and fuel growth
- How APIs increase efficiencies and accelerate innovation while improving CX
- The various ways open banking strategies can be executed, including Banking-as-a-Service, Banking-as-a-Platform, and embedded banking delivery models
- How financial institutions are partnering with fintechs and keeping pace with bigtech disruptors by leveraging APIs to power unique products and solutions

New Tools & Technologies to Turbocharge Social Channels



SOCIAL MEDIA SHOWCASE

Meredith Olmstead

CEO at **FI GROW Solutions**

Frustrated by the myriad of options out there for managing and reporting your organization's social media efforts? This session will review tools, technologies, and third-party solutions in four main categories: content creation, scheduling and automation, content promotion, and tracking/measurement. You'll see what new platforms you need to craft and execute successful social media campaigns with this objective overview of all the solutions your team needs to include in its arsenal.

This session will teach banking executives:

- How to evaluate, assess and select the third-party social media tools, platforms, and build the essential social media toolkit
- The best tools to streamline the creation of powerful and engaging social media content
- The top automation platforms for efficiently scheduling content and managing social media campaigns
- Critical tools for promoting social media content and amplifying social media messages
- Martech tools to track and measure your ROI, and how to quantify the impact of your social media content

Peer-to-Peer Panels

Strategies to Accelerate Innovation in Banking



PEER-TO-PEER PANEL SESSION

Ask any banking CEO if innovation is important, and the answer will likely be “yes,” but financial institutions struggle generating tangible outcomes from their innovation initiatives.

In this panel discussion, your peers will tell you how they overcome the challenges that often thwart innovation at financial institutions — from compliance and regulatory issues, to internal objections and outmoded legacy cores. You’ll learn how to accelerate innovation and create an ongoing pipeline of fresh ideas that increase your competitive differentiation.

This session will teach banking executives:

- Creating a culture of innovation and building cross-functional teams that foster collaboration between departments
- How to generate buy-in and support for new ideas among various stakeholders — from the board and C-suite to frontline employees
- Finding the right opportunities to partner with fintechs, and the critical role open banking plays in an innovation strategy
- The “fail fast” agile philosophy that values extensive testing and incremental development
- The role of a Chief Innovation Officer, and whether your organization needs an ‘innovation lab’ or not
- When, where and how to include back office staff and frontline employees in your innovation initiatives

Inside Open Banking Strategies: Critical Insights & Best Practices for Success



PEER-TO-PEER PANEL SESSION

Hear directly from your peers in the financial industry, as they show you what they’ve learned while successfully deploying APIs and leveraging open banking models to acquire, engage, and expand banking relationships. You’ll learn how they tackled the various development and implementation challenges they’ve faced integrating open banking solutions into their CX strategies.

This is a rare opportunity to hear firsthand from those who have deployed APIs to create new revenue streams by meeting the rising banking expectations of today’s consumers and businesses.

This session will teach banking executives:

- How to identify the right open banking opportunities and select the best fintech partners
- How to build an open banking strategy that leverages APIs to expand product offerings
- How fintechs and banking providers can work together in open banking partnerships that streamline and fully maximize the implementation of APIs
- The compliance and regulatory considerations involved with open banking platforms and API tools
- How to overcome consumers’ concerns about open banking and data-sharing with third-party partners — the security risks, transparency issues, and privacy considerations

Peer-to-Peer Panels

The Future of Retail Delivery in Banking: Balancing Branches and Digital Channels



PEER-TO-PEER PANEL SESSION

Most experts in banking agree on two things: mobile is now consumers' dominant channel — particularly for transactions — but there also continues to be an on-going role for retail branches — specifically for high-value services and more complex interactions. After that, there is little consensus.

In this intense and passionate panel discussion, banking executives and experts will share the lessons they've learned addressing the major retail delivery challenges facing the industry today.

What does the optimal “omnichannel retail strategy” look like for banking providers in the Digital Age, and how do you strike the right balance between channels? What are the right KPIs for this new channel mix? How do you humanize digital touchpoints? How do you build personal relationships with digital customers? How should the branch experience evolve? Should banks shrink the size of their branch networks, and how many branch locations will you need in the future... if any?

This session will teach banking executives:

- How channels must work together in a single, cohesive process that meets consumers' needs
- How call centers must bridge the service gaps between branches and digital channels
- How digital technologies like chatbots, interactive tellers, CRMs, and video interactions fit within your retail delivery model
- How to get internal buy-in as branch networks contract, and ensure front-line staff facilitate a smooth transition to digital channels for customers
- How to pick the right staffing model for your branch network, and whether Universal Bankers should be part of the mix

Digital Transformation Strategy: Engineering the Workforce of the Future



PEER-TO-PEER PANEL SESSION

In the new post-pandemic reality, concepts like “going to work” and “9 to 5” no longer apply. How should banks recruit, train, manage, and retain teams in a world now completely dominated by digital channels? What new skillsets are needed, and how do banks compete for this talent? What is the right work environment for a digital workforce, and how should banks transform their organizational structure?

This panel discussion will address these critical questions, exploring the new internal processes, tools, and technologies banking providers need to remain relevant and competitive in the Digital Age.

This session will teach banking executives:

- How to leverage new technologies that augment human capabilities
- How banks are completely rethinking their headquarters, branches, and offices to engineer workspaces that support their digital transformation strategies
- How to overcome the challenges presented by new work-from-home and hybrid WFH models
- How to build your internal culture and preserve a sense of team while fostering efficient collaboration and innovation among teams working remotely
- Best practices and strategies to ensure staff have the right internal and external digital skills

Peer-to-Peer Panels

The Future of Artificial Intelligence, Machine Learning & Predictive Analytics in Banking



PEER-TO-PEER PANEL SESSION

Artificial intelligence has already had a profound impact in banking — from reducing risks in fraud detection and credit underwriting, to conversational AI, chatbots, and AI-powered voice assistants. With the potential to transform almost every aspect of financial services, the opportunities for AI, machine learning, and predictive analytics are virtually limitless. So what's next?

Join the financial industry's leading authorities as they explore what's on the forefront of AI technologies, including the latest developments in predictive modeling, unstructured data, and advanced algorithmic data applications.

This session will teach banking executives:

- New opportunities for AI-powered technologies to automate processes, achieve greater operational efficiencies, and yield cost reductions while personalizing and enhancing banking experiences
- The strategic considerations, challenges and pitfalls banking executives will face as they build their AI blue print for 2023 and beyond
- How to build, manage, and maintain the “clean data” foundation necessary to power next-gen AI tools and solutions
- How machine learning algorithms model consumer behaviors to predict customers' needs, deepen relationships and identify attrition risks and causes
- How AI can improve consumers' financial health and habits with predictive insights and interventions
- Overcoming issues related to legacy IT systems and how to integrate modern AI tools that enable new digital solutions
- How to find the talent you need to build your internal AI team, and when to partner with fintechs

Social Media in Banking: Best Practices & Strategies for Success



PEER-TO-PEER PANEL SESSION

What role should social media play in a financial institution's marketing and communications strategy? Should Facebook only be used as platform for engagement, service and support, or can it be leveraged to support marketing objectives? Can business banking teams effectively use LinkedIn as a scalable lever for growth? Where does Twitter fit into the mix? Do financial institutions really need to be active on every platform? And how can financial marketers use social channels to create demand for loans and deposit products?

This session will teach banking executives:

- How do you prioritize today's major existing social media channels, and where should you focus your resources — Facebook, YouTube, LinkedIn, Instagram, or Twitter? And which can you ignore?
- How do you establish your advertising budget for social media platforms, and what types of campaigns are most effective?
- What are the best ways to engage your social media community, and how can social channels be used for service and support?
- How do establish social media benchmarks, what are the important KPIs that should be in your dashboard, and how do you demonstrate the impact/results of social media across the organization?
- How do you build and manage the right social media team?
- What role should other channels like Snapchat, TikTok, and Pinterest play in your social media strategy?
- How should you evaluate emerging social media channels and decide which are worth pursuing, so you don't waste time on the next Google+, MySpace or Vine?

Live Demo Sessions

Answers: The Artificial Intelligence Platform Powering Superior CX

Build amazing AI search experiences based on natural language understanding and using a multi-algorithm approach. From backend configuration to frontend customization, **Answers** from Yext provides the tools you need to answer your users questions on your website, in your app or anywhere else people are searching.



In this live demo, banking executives will see:

- How to drive deeper relationships through improved, customized customer experiences



Shane Closser

GM for Financial Services at **Yext**

Leveraging AI and Big Data with the Finalytics.ai Platform

The **Finalytics.ai** platform unlocks insights that create 'Segment of One' experiences, allowing financial institutions to create digital experiences that are unique to each individual's needs. You will see the power of multi-faceted insights and actionable information, such as Millennials in San Diego are much more likely to research car loans on Monday or Tuesday mornings than the rest of the week, and people who search for the phrase "mortgage" are 31% more likely to complete an app than people that search for "home loan." These insights are provided in real time, and no special training is required.

FINALYTICS.AI

This session will teach banking executives:

- How to create a sense that your financial institution knows who customers are — even in digital channels — and what they need
- How to trigger unique marketing content powerfully relevant to each customer's current financial decision
- How a single word can affect the marketing content you present, and how it shapes the response of the consumer



Craig McLaughlin
CEO at **Finalytics.ai**



Mark Ryan
CDO at **Finalytics.ai**

Live Demo Sessions

DocFox: Streamlined Digital Account Opening and Automated Onboarding Platform

DocFox is an automated documentation and onboarding platform for banks and credit unions of all sizes that expedites compliance with enhanced risk rating for new business accounts, including screening for hidden risks, sanctions, and adverse media. DocFox can be configured for any type of customer from business accounts to complex off-shore structures. DocFox ensures that your policies are implemented right the first time and every time after that with an online platform offers everything you need to manage your BSA at the touch of a button.



This session will teach banking executives:

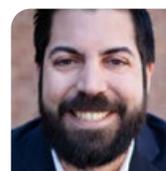
- How to automate and streamline business account opening processes
- How to reduce manual work, increase accuracy, improve CX, and retention metrics
- How to identify and avoid high-risk fields like gambling, cannabis, and protect your institution terrorism, money laundering, drugs, and human trafficking



Dean Benjamin
Sales Executive at **DocFox**

Core iQ: Data-Powered Automated Personalization Platform

Banks and credit unions have more data than any other industry on both potential- and current account holders, but they don't always have the resources to strategically leverage their data and execute strategic multi-channel marketing programs. **Core iQ** from **Onovative** is an all-in-one marketing platform that uses data to automate and personalize the communications that fuel your onboarding, cross-selling, retention and acquisition initiatives. This demo will show you how **Core iQ** acts as an extension of your marketing department to stimulate growth, and help your marketing team save time and resources.



Jon Matar
VP/Business Development at **Onovative**

Live Demo Sessions

Comprehensive All-in-One Customer Intelligence Platform

Total Expert offers the first all-in-one platform that turns data and insights into action and impact. **Customer Intelligence** surfaces consumer insights to provide banks with the data they need to deliver the perfect customer journey. During this demo, see how you can receive key consumer alerts that trigger automated journeys to engage at precisely the right time with relevant, personalized communications. Get a true 360-degree view of consumers with insight into intent and key signals, ensuring you're delivering the right message every time.



This session will teach banking executives:

- How to surface borrower intent with consumer insights and signals
- How to personalize at scale to drive conversions
- How to detect when a lender pulls credit for a mortgage on someone in your database



Joe Welu
Founder and CEO at **Total Expert**



Matt Tippets
Chief Product Officer at **Total Expert**

Marketing Automation Platform from Prisma Campaigns

Prisma Campaigns is a marketing automation platform specifically designed to help financial institutions develop deep and empathic relationships with their customers through personalized marketing campaigns. The solution leverages existing customer data to deliver personalized messages through all digital channels — web, mobile/online banking, email and SMS — in a coordinated and timely way. Prisma Campaigns' open architecture platform integrates with financial institutions' existing tech-stack, and is built to adapt to change and growth.



This session will teach banking executives:

- How to improve cross-selling with targeted campaigns that automatically pull data from your core
- How to improve operational efficiency and customer experience with one single platform to deploy and manage campaigns across multiple channels
- How to increase campaign engagement and conversions with deep personalization of copy and artwork



Felipe Gil
CEO at **Prisma Campaigns**

Live Demo Sessions

Bill Center: Simplifying and Centralizing Bill Management

Bill Center is a personal finance tool that enables consumers to consolidate, access, and more easily manage and pay all their financial obligations from a single application.

In this demo, attendees will get an exclusive look at how **Bill Center** simplifies bill management and payments through an intuitive, centralized experience that provides consumers with full bill details, connectivity to 15,000+ billers across the U.S., and expanded payment options including real-time card payments.

Paymentus



Marcell King

Chief Innovation Officer at **Payveris**



Russ Islamov

Senior Solutions Consultant at **Payveris**

Methodify: Self-Serve Research

To succeed and stand out in today's crowded financial marketplace, new and innovative consumer insights are needed now more than ever. BMO Financial Group, one of North America's leading financial institutions, thoughtfully invests in research technology to achieve this success. Join Maja Neable, Chief Marketing Officer for BMO, and Raj Manocha, EVP – Methodify at Schlesinger Group, for a lively demonstration of how **Methodify**, BMO's research technology of choice, delivers key insights to marketers. They will also share how this technology can better support strategy execution, make your organization more client-centric, and help you find the answers you need whenever you need them.



Raj Manocha

EVP of Methodify at **Schlesinger Group**



Maja Neable

SVP/CMO at **BMO Financial Group**

Live Demo Sessions

Knowledge Management Suite from eGain

Learn how this AI-powered knowledge management solution helps financial institutions improve CX and increase sales with a personalized, scalable, and compliant tool providing advice and guidance to customers across all touchpoints.

eGain

In this live demo, banking executives will see:

- **eGain Knowledge Hub™** — Enabling customers to find answers via self-service and escalate with full context to agent-assisted service, while also providing in-band conversational and process guidance to customer service agents.
- **eGain Sales Advisor™** — An end-to-end solution for sales across self-service and human-assisted touchpoints, enabling customer needs' assessments and financial check-ups.
- **eGain Virtual Financial Coach™** — An automated service providing highly personalized guidance on strengthening credit, paying down debt, and increasing savings, infused with users' TransUnion credit data and financial advice from GreenPath Financial Wellness.



Evan Siegel
VP/Financial Services AI Solutions at **eGain**

Givr Cryptocurrency-Based Banking Loyalty Program from CU Content

Cryptocurrency is still a mystery for many consumers. By embracing the Givr cryptocurrency as a loyalty program at your bank or credit union, you're increasing member/customer loyalty with a new rewards system while giving your people a comfort level with digital assets — without any risk to your financial institution.

CUcontent
Est. 2002

This session will teach banking executives:

- How banking providers can integrate cryptocurrency into their product mix without actually using it
- How to reward members and customers and provide valuable knowledge without overwhelming them
- How to engage people with cryptocurrency without endorsing high-risk cryptocurrency investing
- Actionable tips on how to better serve consumers through responsible innovation



Laura Enock
Publisher at **CUcontent**

Live Demo Sessions

Deluxe Data Discovery

Learn how to harness the power of data to create personalized experiences for customers and prospects with **Deluxe Data Discovery**. Marketing triggers built around both credit- and life events enable banks to create personalized and timely communications — getting the right message to the right person at the right time.

deluxe

This session will teach banking executives:

- How Deluxe's new data platform, **Deluxe Data Discovery**, enables financial marketers to tap into the world's deepest trigger database to position their solutions to both consumers and businesses with high purchase propensity.
- Deluxe can help your bank reach over 1 million businesses and 2.4 million consumers that are experiencing important milestones every month.



Kris Lazzaretti

Head of Deluxe Data-Driven Marketing

CuneXus Digital Storefront from CUNA Mutual

CuneXus reinvents the way financial institutions approach consumer lending by delivering tailored financial products and services with one-click convenience through a digital storefront. In this demo, you'll see how this fully-integrated lending platform provides financial institutions greater transparency into their account holders' needs and eliminates challenges in the lending process.



Barry Kirby

SVP/Managing Director at **CuneXus**

Live Demo Sessions

Vivalociti Real-Time Personalization Tool from La Macchia Group

In this demo, get a sneak peek at the **Vivalociti** platform for connecting in-branch data analytics to marketing and content deployments. This solution showcases how banks and credit unions can leverage real-time personalization based on integrated data collection techniques.



In this live demo, banking executives will see:

- How to drive deeper relationships through improved, customized customer experiences



Tom Kennedy
President at **LaMacchia Group**

Want to **become a speaker** or participate in one of our **panels**?

Do you have a project you think should be included as a **case study** in one of these sessions?

Any suggestions, please **send us an email** 

Registration Details



Sign up today and get a free upgrade to a **Gold Pass** worth \$770.00!

Includes access to the **Forum+** video library

The **Forum+** on-demand video channel gives you **24/7 access** to video recordings of all **Forum 2022** keynotes and breakouts*, with **100+ bonus sessions** — **a \$595 value!**

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Don't miss legendary comedy all-star **Jay Leno** on Sunday, November 13, with his private stand-up performance exclusively for **Forum 2022** attendees opening night — **a \$175 value!**



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- Free copies of the **2023 Digital Banking Trends & Predictions Report** and the **State of Financial Marketing Report**.
- Invaluable networking opportunities with best and brightest in banking — **over 2,500 senior leaders** in financial services!
- Three fully hosted networking **cocktail receptions**.
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Banks + Credit Unions \$2,345
Total savings of **\$850.00**

REGISTER BY SEPTEMBER 15TH TO SAVE BIG!



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* Speaker restrictions and/or technical difficulties during the live event may prevent some presentations from being included in the final compilation of session recordings.

Registration Details

Register by **July 28th** to get the **Summer Discount!**

Banks and credit unions that register now will **save big**, and get a **free upgrade to a Gold Pass.**

Banks and Credit Unions	EARLY BIRD DISCOUNT ENDED JUNE 9, 2022 \$1,590 Includes a free upgrade to a Gold Pass. Total savings of \$1,605.00	SUMMER DISCOUNT ENDED JULY 28, 2022 \$1,990 Includes a free upgrade to a Gold Pass. Total savings of \$1,205.00	FINAL DISCOUNT ENDS SEPTEMBER 15, 2022 \$2,345 Includes a free upgrade to a Gold Pass. Total savings of \$850.00	REGULAR PRICE ON-SITE STANDARD RATE \$2,695 Add a Gold Pass for \$500.00
	EARLY BIRD ALUMNI DISCOUNT ENDED JUNE 9, 2022 \$1,340 Includes a free upgrade to a Gold Pass. Total savings of \$1,855.00	SUMMER ALUMNI DISCOUNT ENDS JULY 28, 2022 \$1,740 Includes a free upgrade to a Gold Pass. Total savings of \$1,455.00	FINAL ALUMNI DISCOUNT ENDS SEPTEMBER 15, 2022 \$2,095 Includes a free upgrade to a Gold Pass. Total savings of \$1,100.00	REGULAR PRICE ON-SITE STANDARD RATE \$2,695 Add a Gold Pass for \$500.00
Group of 3+ Each person gets a free upgrade to a Gold Pass (Banks and credit unions only)	GROUP DISCOUNT - ENDS OCTOBER 12, 2022 \$1,590 Save \$1,605.00 per person!			
Vendors, Consultants, Analysts, Suppliers, Associations and Everyone Else Includes automatic upgrade to a Gold Pass. Limited to 100 attendees in this category.				\$2,695
Attendee Companion Pass Includes 3x breakfasts, 3x lunches, 3x receptions and ticket to Jay Leno's performance for your spouse or traveling companion.				\$595

* ALL RATES AND DATES SUBJECT TO CHANGE.

Don't wait! Time is running out. Register now, **before it's too late!**

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PER NIGHT!

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