

# THE FINANCIAL BRAND

May 20-22 | Las Vegas | [Forum2024.com](https://forum2024.com)

**FORUM**



Scott **Galloway**

 **NYU | STERN**

**JIM GAFFIGAN**

CINDY  
CRAWFORD

Dan **Schulman**

 **PayPal**

Tia **White**

MACHINE LEARNING  
& AI EXPERT

# Experience the world's most elite conference on marketing, CX, data analytics, AI, and digital growth strategies in the banking industry.

Join more than 3,000 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 2024** 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.

# Forum 2024 Highlights



## BIG IDEAS

Three days packed wall-to-wall with killer keynotes, how-to sessions, live demos, case studies and in-depth workshops focused on fueling your growth.



## INVALUABLE NETWORKING

Connect with senior leaders from 900+ of the world's most progressive institutions — over 3,000 of the best and brightest minds in banking.



## WORLD-CLASS SPEAKERS

An unbelievable lineup of all-star speakers featuring the biggest names in the business world that will inspire you and your team.



## VIDEO RECORDINGS

With a **Gold Pass**, you get access to the **Forum+** video library, with recordings of all keynotes and breakouts — plus exclusive monthly content.



## UNIQUELY RELEVANT

Explore emerging trends, learn new tools and discover groundbreaking innovations — the latest breakthroughs that are reshaping banking today.



## DIGITAL TOOLBOX

Receive a 2GB toolbox loaded with valuable white papers, research reports and eBooks, plus digital copies of slide decks from all sessions.



## PROVEN STRATEGIES

Nothing but concrete ideas, actionable strategies, and best practices you can implement immediately.



## MONEY-BACK GUARANTEE

If you don't come home with dozens of new ideas and actionable insights that build both your brand and your bottom line, we'll give your money back.

# Forum 2024 Who Attends

# 3,000+

TOTAL NUMBER OF  
PROJECTED ATTENDEES

# 900+

 DIFFERENT FINANCIAL  
INSTITUTIONS

# 1 IN 11

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

DISCOVER

PNC

B|E|C|U

charles  
SCHWAB

Capital One

USAA

TD Bank

ally

NAVY  
FEDERAL  
Credit Union

KeyBank

usbank

First Tech  
federal credit union

REGIONS

RBC

UMPQUA  
BANK

FirstBank  
Since 1894

BMO

BANK OF THE WEST  
BWP PARIBAS

ARVEST  
BANK

UMB

IBERIABANK

Associated Bank

CIBC

ZIONS  
BANK

# Forum 2024 Who Attends



MORE THAN  
**1 IN 5**

ATTENDEES ARE  
DECISION-MAKERS  
IN THE C-SUITE



OF ATTENDEES WORK AT A  
RETAIL FINANCIAL INSTITUTION



**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**

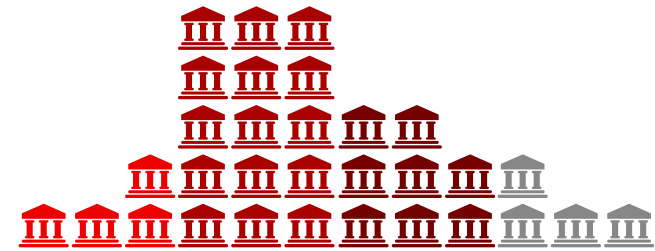
## Most common attendee titles

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



C-SUITE	EVP & SVP	VICE PRESIDENT	MANAGER OR DIRECTOR
<b>24%</b>	<b>17%</b>	<b>26%</b>	<b>24%</b>

## Role & Level



OVER \$10 BILLION	\$1 BILLION TO \$10B	\$500M TO \$1 BILLION	\$250M TO \$500M
<b>11%</b>	<b>62%</b>	<b>16%</b>	<b>12%</b>

## Asset Size

**FINAL DISCOUNT - REGISTER BY APRIL 4TH!**

# Save **\$1,170.00**

Sign up today to save \$300 and get a free upgrade to a **Gold Pass** worth \$870

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

The **Forum+** on-demand video channel gives you **24/7 access** to video recordings of all **Forum 2024** keynotes and breakouts\*, with **150+ bonus sessions** from previous **Forum** conferences.

Free ticket to see **Jim Gaffigan!**

Don't miss legendary comedy icon **Jim Gaffigan** on Monday, May 20, with his private stand-up performance exclusively for **Forum 2024** attendees opening night.

**REGISTER NOW**

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



FINANCIAL BRAND

**FORUM**



Available to  
all **Gold Pass**  
attendees!

On-demand video streaming channel

**All** Forum  
**2024**  
keynotes and breakouts\*

**150+**  
how-to sessions and  
educational presentations

Fresh insights from the industry's best and brightest  
— speakers like Cindy Crawford, Barbara Corcoran,  
Gary Vaynerchuk, Magic Johnson, Daymond John,  
and countless experts from around the banking world.

# Forum 2024 Schedule

EXPANDED  
AGENDA  
FOR 2024!

To get the most out of the **Forum 2024**, we recommend you book your stay at **The Aria Hotel & Resort** in Las Vegas starting the night of **Sunday, May 19th** so that you don't miss Monday's workshops, hosted grand opening reception, and **Jim Gaffigan's private comedy show.**

We also recommend you book your stay through Wednesday night, checking out **Thursday, May 23rd.**

More details and updates  
available online

ONLINE SCHEDULE



## MONDAY MAY 20

### 9:00 AM Morning Masterclass Workshops

Intensive, in-depth, half-day masterclasses ending at 12 noon.

- **Executive:** Advanced Strategic Planning
- **Innovation:** Digital Banking Channels
- **Marketing:** Hacking Human Behavior

### 1:00 PM Afternoon Masterclass Workshops

Intensive, in-depth, half-day masterclasses ending at 4 pm.

- **AI:** Leveraging Artificial Intelligence
- **Digital Growth:** Maximizing ROI
- **Branding:** Repositioning for Growth

### 5:00 PM Grand Opening Reception

Enjoy great food, hot hors d'oeuvres, and complimentary drinks from a hosted open bar.

### 7:30 PM Live Entertainment

A private stand-up performance by legendary comedian Jim Gaffigan exclusively for Forum attendees who have a Gold Pass.

Jim Gaffigan



# TUESDAY MAY 21

## 7:00 AM Networking Breakfast

Hot breakfast and **Starbucks** espresso coffees. Three educational **Power Breakfast** sessions also available.

## 8:30 AM Opening Celebrity Keynote

Don't miss international supermodel Cindy Crawford, who will share the business and branding lessons she's learned through her remarkable career.

Cindy Crawford



## 9:30 AM Concurrent Sessions

**Five breakout sessions** and **two live demos** for attendees to choose from.

## 10:30 AM Concurrent Sessions

**Five breakout sessions** and **two live demos** for attendees to choose from.

## 11:30 AM Networking Luncheon

Gourmet lunch provided for all attendees. Educational **Lunch-and-Learn** sessions also available.

## 1:00 PM ForumX Artificial Intelligence

Two high-level, TEDx-style talks on the strategic issues, risks, opportunities and challenges surrounding AI in banking.



## 2:00 PM Concurrent Sessions

**Five breakout sessions** and **two live demos** for attendees to choose from.

## 3:00 PM Concurrent Sessions

**Five breakout sessions** and **two live demos** for attendees to choose from.

## 4:00 PM Featured Keynote Speaker

Featured on 200+ TV shows, Jason Dorsey will show you how to uncover defensible differences between you and your competitors, then turn those into fuel for growth.

Jason Dorsey



## 5:00 PM Networking Cocktail Reception

Enjoy great food, hot hors d'oeuvres, and complimentary drinks from a hosted open bar.

# WEDNESDAY MAY 22

## 7:00 AM Networking Breakfast

Hot breakfast and **Starbucks** espresso coffees. Three educational **Power Breakfast** sessions also available.

## 8:30 AM Featured Keynote Session: CEO Summit



Lessons in **leadership** and **strategic growth** from two notable CEOs.



## 9:30 AM Concurrent Sessions

**Five breakout sessions** and **two live demos** for attendees to choose from.

## 10:30 AM Concurrent Sessions

**Five breakout sessions** and **two live demos** for attendees to choose from.

## 11:30 AM Networking Luncheon

Gourmet lunch provided for all attendees. Educational **Lunch-and-Learn** sessions also available.

## 1:00 PM Forum X Growth Marketing

Two of the world's most respected marketing experts share **insights into growth strategies** in this pair of high-level, **TEDx**-style talks.



## 2:00 PM Concurrent Sessions

**Five breakout sessions** and **two live demos** for attendees to choose from.

## 3:00 PM Concurrent Sessions

**Five breakout sessions** and **two live demos** for attendees to choose from.

## 4:00 PM Forum U

Learn **cutting-edge leadership skills** and **critical new management strategies** from two world-renowned university professors.



## 5:30 PM Networking Cocktail Reception

Enjoy great food, hot hors d'oeuvres, and complimentary drinks from a hosted open bar.

# Featured on the **Main Stage**

## Cindy Crawford

INTERNATIONAL BUSINESS ICON

**Cindy Crawford** is a renowned American supermodel and businesswoman. She rose to international fame as one of the most iconic and recognizable faces in the fashion industry.

In this can't-miss moderated Q&A, she will share the lessons that have fueled her successful journey from a supermodel to a successful entrepreneur and business mogul, offering senior executives valuable insights into the power of persistence, branding, collaboration, grit, calculating risks, business agility, and adaptability.

## Jason Dorsey

GLOBAL MARKETING EXPERT

Featured on 200+ TV shows including **60 Minutes**, **CNBC** and **The Today Show**, **Jason Dorsey** is one of the world's foremost marketing experts.

His inspiring, high-energy keynote will show you how to uncover hidden differences between you and your competitors and turn those into fuel for growth.

Jason separates myth from fact with practical, actionable insights grounded in the extensive behavioral research he has conducted on four continents. Jason's latest bestselling book is *Zconomy*.

60  
MINUTES

The New York Times

CNN

CNBC

npr

Inc.



# CEO Leadership Summit

In these riveting keynotes, CEOs from two **Fortune 500** companies share their insights into strategic leadership and how to lead your organization through major periods of transition.

## Dan Schulman

Former CEO of **PayPal**

**Dan Schulman** is one of the most influential leaders in the business world, having previously served as the head of enterprise growth at **American Express**, the president of **AT&T**, and the CEO of **Virgin Mobile**.

As one of the world's foremost experts on digital payments and a leading authority on mobile technologies in the financial industry, he will share his insights on the future of money and discuss how emerging global trends impact the unique challenges and opportunities facing banking executives today.



## Reggie Fils-Aimé

Former **Nintendo** Exec

Renowned businessman, award-winning innovator and disruptor **Reggie Fils-Aimé** is a proven expert on transforming companies, revitalizing brands, and reshaping industries to solve daunting challenges and achieve the "impossible."

In this talk, the legendary former president and COO of **Nintendo** will share his seven leadership principles for driving innovation in an age of disruption. You'll get actionable advice for increasing your capability and capacity to innovate across your entire organization.



# ForumX Artificial Intelligence

High-level strategic presentations focused on preparing you and your organization for the future — like **TEDx** for banking!

## Tia White

AI & Machine Learning  
Industry Executive

**Tia White** is a true disruptor, helping multiple **Fortune 100** companies pioneer major transformations involving AI and machine learning.

At the **Forum 2024**, Tia will discuss the future of machine learning in the banking sector, based on her past experience where she served as the Sr. Executive Director for Machine Learning at **Capital One**, the Head of Machine Learning at **JP Morgan Chase**, and the Director of Enterprise Database Engineering at **Wells Fargo**.

## Mike Walsh

CEO of **Tomorrow**

The entire financial ecosystem is on the cusp of disruption, with AI-powered algorithms and automation poised to completely redefine the concepts of money, finance and wealth.

Brace yourself for this riveting presentation, as futurist **Mike Walsh** explores the rise of generative AI in banking. Walsh, a popular author and speaker well-known for his thought-provoking insights on emerging technologies, AI, and digital transformation, will discuss how financial institutions must adapt to thrive in this rapidly changing digital frontier.

# ForumX Strategic Marketing

High-level strategic presentations focused on preparing you and your organization for the future — like **TEDx** for banking!

## Scott Stratten

President of  
**UnMarketing**

Drawing from his experience as a marketing industry innovator and the author of six best-selling business books, **Scott Stratten** talks about the big picture — creating loyal, repeat customers who become brand evangelists because they genuinely love the goods or services you provide.

With humor, passion and candor, this former **TEDx** speaker blends real world strategies with memorable stories that will completely change the way you market and sell, for the better.

**TEDx**

## Bonin Bough

Global Marketing Guru

**Bonin Bough** has spearheaded some of the most successful billion-dollar brand transformations in the world, including **PepsiCo**, **Oreo**, **Cadbury's**, **Gatorade**, and **Frito-Lay**.

In this keynote presentation, Bonin will show you how to drive marketing innovation across your organization. You'll learn how to overcome ingrained behaviors and innovate the way you approach growth.



# ForumU

Learn cutting-edge leadership skills and new management strategies from professors at two of the most prestigious business schools in the world.

## Scott Galloway

Professor of Marketing at  
**NYU Stern**

Bestselling author and celebrated marketing professor **Scott Galloway** has spent his career learning what makes the world's leading companies tick. He teaches brand strategy and digital marketing at **NYU's Stern School of Business**, where he has been named one of the world's best business professors.

At the **Forum 2024**, Scott will take an unvarnished look at what separates the winners and losers in the digital age. He will examine the tectonic forces shaping banks' strategic plans in 2024 and beyond, from demographic trends and consumer behavior, to AI and CX.



**NYU | STERN**

**LEARN MORE**



## Wendy Smith

Professor of Business at  
**University of Delaware**

**Polaroid, Blockbuster, Kodak, Nokia, Borders, Blackberry.** These once venerated companies tried to innovate. They tried to adapt, pivot and evolve. But all of them ultimately failed. Today, traditional financial institutions face a similar struggle for survival.

Management thought leader, award-winning organizational psychologist, and best-selling author **Wendy Smith** will examine how senior banking executives should respond to strategic paradoxes, specifically the risks and challenges facing leadership teams in times of disruption.



UNIVERSITY OF DELAWARE  
**LERNER BUSINESS  
& ECONOMICS**

# In-Depth Workshops | Monday, May 20 9 am - 12 noon

## EXECUTIVE MASTERCLASS: Advanced Strategic Planning to Maximize Growth



**Dr. Sean Payant**  
Chief Strategy Officer &  
Senior EVP at **Haberfeld**

You're accountable to your board of directors to hit your performance and profitability KPIs. But far too often, a combination of complicated products, processes, and policies restricts growth. Compounding the problem, the "conventional wisdom" frequently dominating boardroom decisions can thwart your organization's ability to achieve its goals.

In this workshop, you'll see how your peers in the C-suite tackle the biggest strategic planning challenges they face today. We will uncover **proven methods** and share **best practices** from the most successful banks, and show you how they build a strategic roadmap that drives meaningful and measurable results. You'll learn how to evaluate the data to identify the critical changes needed in your strategic plan to maximize growth.

### **This workshop will teach banking executives:**

- How to overcome "conventional wisdom" to **fuel growth**, improve overall financial performance, and **increase profitability**
- Increase production by evaluating your financial institution's products, processes, and policies
- How to **apply data-driven frameworks** to your strategic planning initiatives, and data-driven strategies that achieve **maximum marketing ROI**
- How to equip and empower your teams for long-term success, while lowering turnover

## INNOVATION MASTERCLASS: Ideation, Implementation & Success in Digital Banking Channels



**Jim Marous**  
Co-Publisher of **The Financial Brand** and host of the **Banking Transformed** podcast

Success with digital transformation is determined by the ability to adapt to new, unprecedented market conditions. Banking providers with a 'challenger mindset' will be best positioned to thrive.

Buckle up for this fast-paced workshop led by **Jim Marous**, the world's foremost expert on digital banking strategies. Learn how to move new ideas forward with speed and scale, featuring multiple global practitioners who will discuss the tools, behaviors, mindsets, and systems required to conquer the innovation challenge in banking today.

### **This workshop will teach banking executives:**

- Why innovation is the most critical component in your growth engine
- The challenges of iterative innovation, and how to overcome them
- Technology, talent, leadership/culture and back office lessons that apply to all asset sizes
- How to move from being a legacy financial institution to an agile challenger brand
- The keys to democratizing innovation across an organization
- How to navigate the build vs. buy vs. partner collaboration decision, and choose the right model for innovation success

## MARKETING MASTERCLASS: Leveraging Behavioral Science to Craft Irresistible Campaigns



**Nancy Harhut**  
Co-Founder and Chief Creative Officer at **HBT Marketing**

Consumers don't act rationally, they react automatically. Today, the smartest CMOs are leveraging behavioral science to **hack human behavior** and trigger automatic responses.

In this workshop jam-packed with **real-world examples**, you'll discover over a dozen decision-making shortcuts deeply ingrained in consumers' psychology, and how you can easily incorporate them into your campaigns to **instantly improve ROI**. You'll learn scientifically-proven and **market-tested principles** such as the Endowment Effect, Autonomy Bias, Information Gap Theory, and much more.

### **This workshop will teach banking executives:**

- How to tap into the mental shortcuts that drive consumer behavior
- The secrets of brain science that motivate and persuade consumers to take action
- The secrets of the world's most effective marketing campaigns — the tips, tricks, and techniques that can double your results
- A specific four-word phrase that doubles the likelihood people do what you ask
- One single word that can make people automatically agree with you (and why it works so well)
- The common pitfalls and mistakes marketers make — and how to avoid them

# In-Depth Workshops | Monday, May 20 1 pm - 4 pm

## AI MASTERCLASS:

### Unlocking the Power of Artificial Intelligence in Banking



**Ron Shevlin**

Chief Research Officer  
at **Cornerstone Advisors**

This can't-miss workshop covers all the critical elements of artificial intelligence in banking — from predictive analytics and natural language processing, to machine

learning and generative AI — including practical strategies, ethical considerations, and future trends.

Jam-packed with lessons learned from industry leaders and **real-world case studies**, you'll learn the steps needed to create your own **AI roadmap**, with **best practices** for successful adoption and implementation.

#### This workshop will teach banking executives:

- Successful AI implementations in banking, including personalized recommendations, fraud detection/prevention (AML), conversational AI chatbots powered by natural language processing, and more
- How to build, train, evaluate and validate AI models
- A strategic framework to help you choose the right AI tools, technologies, partners and platforms
- Risk management, regulatory and compliance challenges, including cybersecurity threats and AI vulnerabilities

## DIGITAL GROWTH MASTERCLASS:

### Maximizing Marketing ROI



**James Robert Lay**

Chief Executive Officer at  
the **Digital Growth Institute**

Exponential changes in technology have transformed the way people shop and buy financial products, leaving unseen gaps in your digital marketing systems and sales

processes that can be costing you millions in loans and deposits.

If you are struggling to see the ROI in digital marketing channels, you might be one of the 85% of financial brands lacking a concrete digital growth strategy. This workshop will give you a proven strategic framework supported by real-world examples that will accelerate your future digital growth potential, exponentially increase your marketing efficiency, and maximize ROI.

**Bonus:** All workshop attendees receive a copy of the best-selling book, **Banking on Digital Growth**.

#### This workshop will teach banking executives:

- How to quickly identify and close the biggest gaps in key digital buying journeys
- Proven AI, data, and automation strategies that will help you target, nurture, and convert more loans and deposits
- The top automation technologies needed to build a hyper-efficient digital growth engine
- Three proven marketing strategies to increase digital leads by as much as 1,500%
- Leverage data to personalize digital banking experiences through every stage of the buying journey
- How to increase web traffic by producing 10X more content with AI tools

## BRAND STRATEGY MASTERCLASS:

### Repositioning Banking Brands for Strategic Growth



**Juliet D'Ambrosio**

Chief Experience Officer  
at **Adrenaline**

Fire up the engines of change in this high-energy workshop exploring the ins-and-outs of rebranding. Don't miss this candid session with senior

banking executives who have successfully repositioned their brands for growth. They will share their experience, and show you how to navigate the journey — including the do's and don'ts of implementing innovative brand strategies.

Whether you're pursuing an **M&A strategy** or expanding into new markets, you'll learn how to leverage your brand to connect and grow with the right audience. Jam packed with actionable insights, this research-based workshop will give you an executional **Brand Management Playbook** built on best-practices.

#### This workshop will teach banking executives:

- How to deliver a unique brand experience and leverage your brand's competitive advantages — from strategy and identity, to storytelling and experience design
- Why, when, and how to reposition your brand for greater relevance and growth
- How to map the gaps between banking brands and consumers using a diagnostic '**Relevance Scoring**' system
- How to successfully launch rebrands across all audiences and constituencies to drive more growth
- Strategies and tactics to gain stakeholder and employee advocacy through change

# How-To Strategy Sessions

## Predictive Data-Driven Digital Marketing Strategies for Customer Acquisition and Deposit Growth

**Tom Sullivan**  
CEO of **Princeton Partners**



Banks and credit unions are losing market share to the largest financial institutions in the U.S. Why? Because they underinvest in marketing. Research encompassing 2,500 banking providers now clearly demonstrates the proven mathematical relationship between marketing investments and revenue growth.

This session will show you how smaller institutions can now apply the same strategic, data-driven tools and best practices that megabanks use to attract and acquire new customers. You'll learn how to design strategic digital marketing programs that accelerate deposit growth with higher-ROI and more predictable outcomes.

### **This session will teach banking executives:**

- How to optimize media investments, prioritize markets, and target segments to drive more market share over time
- How the power of AI-enabled tools optimize campaign performance by managing offers, messaging and media mix
- How progressive marketers are using big data to discover hidden prospects and untapped marketing opportunities
- How human-managed generative AI creatively helps you to better reach and convert your target audiences
- How to determine if your marketing investments are at the right % of assets in your peer group to drive maximum revenue growth

**Bonus:** Attendees will get a free copy of the Princeton Partners' study of 2,500 community banks, **The Proven Relationship Between Marketing Investments & Revenue Growth**.

## Unlocking the Power of ChatGPT to Transform Financial Marketing Content

**Ben Udell**  
SVP Digital Innovation at **Lake Ridge Bank**



ChatGPT and similar generative AI tools are gamechangers in marketing. This session will give you a roadmap to supercharge content creation with ChatGPT using a repeatable process that achieves amazing results. It's easy, inexpensive, and you can get started immediately when you return to your office.

You'll get a step-by-step demonstration as we build various components of an actual marketing campaign together, including a first draft of a client email, marketing taglines, a direct mail piece, FAQs, internal communications, a training guide, banker quiz, and even compliance disclaimers.

### **This session will teach banking executives:**

- How to use ChatGPT to generate and accelerate a full spectrum of marketing content for more engaged, dynamic campaigns
- How little work is required upfront to build an effective model that will save your marketing team significant time and create repeatable results
- How to create a "marketing persona" so that your brand voice is applied consistently when AI tools like ChatGPT generate content
- What a "Generative Pre-training Transformer" (GPT) is, and how to create, implement, and refine your own
- The dos, don'ts and pitfalls of generative AI, with tips to address privacy, bias, and other risks

# How-To Strategy Sessions

## DIGITAL BANKING SHOWCASE (LIVE DEMOS):

### From PFI to 'Primary Financial Interactions'

**Dave DeFazio**

Principal at **StrategyCorps**



In the battle for banking relationships, fintechs and neobanks are vying for dominance. And they may be winning. In the last three years, digital banks have the largest growth rates of primary relationships. And now, more **Millennials** and **Gen Z** consumers name a digital bank as their primary institution than all of the community banks and credit unions combined.

In this session, you'll experience **live demonstrations** of **breakthrough apps** that are reimagining the digital banking experience, changing consumer behaviors, and fundamentally redefining what "PFI" now means.

#### **This session will teach banking executives:**

- The secret to growth in retail banking, and how it hinges on understanding the emerging digital trends driving consumers' rapidly shifting attitudes towards the banking products they now prefer
- How AI-powered chatbots like 'Erica' from BofA are evolving at a breakneck pace, and how they are stripping complexity out of the mobile banking experience
- How challenger banks like MoneyLion use unique fintech features designed for low-income segments, including friendly subscription pricing strategies instead of the penalty-based fee structures that dominate traditional banking
- What the intersection of retail and payments looks like from Amazon One, an innovative new merchant payment system using a palm print to reinvent the shopping and payment experience

### Innovative Marketing Strategies to Launch Next-Gen Financial Products

**Andrew Davidson**

Chief Insights Officer at **Mintel**



In today's rapidly evolving financial landscape, banks and credit unions must constantly innovate to stay ahead of the curve and attract new customers. This session will equip you with actionable insights to effectively launch new banking products and financial services. Learn from pioneers in the financial industry who are pushing the envelope with innovative go-to-market strategies, and see case studies illustrating how they ensure success. Whether you're launching a new fintech tool, credit card, BNPL program, debit/deposit product, wealth/investment service, or small business solution, this session will inspire you with innovative ideas for your next rollout.

#### **This session will teach banking executives:**

- Creative launch strategies to amplify awareness of your new products, generate buzz, and accelerate speed to market
- How to position new products and features that cater to consumers' evolving preferences and expectations
- How to target specific customer segments with personalized, hyper-relevant campaigns
- How to strategically plan for product enhancements and updates to keep your offerings fresh
- Emerging trends in new product innovation and untapped market opportunities that will give you a competitive edge

# How-To Strategy Sessions

## Optimizing Onboarding & Cross-Selling in Banking: A Roadmap to Deeper Relationships



**Tricia Hrotko**

Chief Customer Officer at **Digital Onboarding**

Banks and credit unions typically prioritize new account acquisition over deepening existing relationships. Even those institutions with onboarding and cross-selling programs still often rely on brochures, mailers, and phone calls. That might have worked in 2005, but it doesn't anymore. You need an omni-channel onboarding process ensuring a seamless transition between channels, including mobile apps, websites, and in-branch visits.

This session will show you what a best-in-class onboarding experience looks and feels like in the Digital Age, including the timing, messaging, and tools needed to turn new account openers into deep, profitable relationships. You'll see how the most advanced institutions are leveraging data analytics and artificial intelligence to create personalized onboarding journeys for customers.

### **This session will teach banking executives:**

- The onboarding and cross-selling mistakes many financial institutions make (and why they fail)
- How, when and where to implement cross-selling and upselling within the onboarding process
- How points of friction during a customer's first 90 days are your worst enemy, and how to fix them
- Predictive strategies to recommend next-best products based on customer signals and their initial path-to-purchase
- How AI and chatbots can accelerate and augment your onboarding and cross-selling initiatives
- How to integrate the principles of gamification into your onboarding process
- The onboarding and cross-selling metrics you need in your KPI dashboard

## Conquering the Competition with Advanced Targeting Tactics



**Jim Pond**

Co-Founder of **JXM**

This session will arm you with a range of hyper-effective tactics you can use to target potential customers who are currently considering- or already engaged with your competitors.

You'll learn how to leverage competitive intelligence effectively, and see how advanced concepts like addressable geofencing, device ID lookback techniques, and automatic content recognition (ACR) are enabling some truly remarkable and jaw-dropping results. Financial marketers will see how these ridiculously powerful new marketing strategies and innovative martech tools are completely rewriting the rules of warfare on today's digital marketing battlefield.

### **This session will teach banking executives:**

- How to target users who receive your competitors' emails
- How to target customers who've previously purchased from your competitors
- How to target people using your competitors' mobile banking apps
- How to target users exposed to your competitors' ads
- How to use advanced geofencing tactics to target consumers who've visited a competitor's branch locations
- How to target potential customers who are searching for your competitors online
- How to create custom audiences using competitor-related online footprints
- How to exploit specific social media signals to identify and engage potential customers interested in similar brands

# How-To Strategy Sessions

## Harnessing the Potential of Generative AI in Banking

**Vivek Jetley**

EVP/Global Head of Analytics at **EXL**



Explore practical, real-world business applications and multiple use-cases of generative AI in consumer banking. You'll see how generative AI is reshaping the banking landscape by optimizing customer interactions, streamlining processes, and enhancing decision-making for improved financial outcomes. In this presentation, you will hear how banks are using generative AI applications to create operational and cost efficiencies, and improvements in customer service.

This is the conversation that every CEO, CIO and CMO needs to have.

### **This session will teach banking executives:**

- The challenges, capabilities and potential impact of generative AI in retail/consumer banking
- The right way to plan and prepare, including the investments that need to be made, and the operational costs that should be considered
- The key foundational components and technology infrastructure considerations that should go into your generative AI strategy
- How the right generative AI strategies are based on a prioritization framework that balances time, value and certainty

## Demographic Disruption: Banking in an Aging America

**Joe Sullivan**

CEO of **Market Insights**



America is on the verge of a demographic crisis that will disrupt every aspect of our society, our economy... and the banking industry. Millennials are entering their 40s, birth rates are falling, death rates are rising, and by 2034, older adults will outnumber children for the first time in U.S. history. Most industries — financial institutions in particular — are ill-prepared to meet the challenges, pain points, and opportunities presented by a customer and employee base that is both aging and shrinking.

This powerful session explores how bankers must rethink their strategic plan for long term relevance and success in the face of accelerating demographic shifts. If you work in banking (and aren't retiring in the next 10 years), you need to prepare for how consumers will spend, borrow, and save... now.

### **This session will teach banking executives:**

- How the inevitable tectonic shifts in demographics (i.e. birth rate, mobility, diversity, debt, etc.) will impact demand for financial services
- Implications for service delivery and how consumer spending/savings trends will shift
- Key metrics to gauge, estimate, measure and forecast the long-term viability of existing markets
- How you will need to redefine your workplace, attract talent, and adapt your workforce for the future

## Earn **CFMP** Continuing Education Credits at the **Forum 2024!**

Attendees may earn credits to maintain their **Certified Financial Marketing Professional** (CFMP) certification.

**The Financial Brand Forum** has been approved for **23 CFMP credits**. Attendees must self-report with ABA to obtain CE credit.

# How-To Strategy Sessions

## Humanizing Digital-First Banking

### Doug Brown

President & GM, Digital Banking at **NCR Voyix**



Banks and credit unions know they must build a digital-first strategy, but “digital-first” does not mean “digital only.” In the Digital Age, it’s easy for the human element to get lost — especially in banking. As the number of digital transactions and touchpoints increase exponentially, ensuring a seamless blend of technology and empathy is critical to building long-term, profitable relationships.

This session will take a deep dive into what it means to truly adopt a digital-first mindset throughout your entire organization while also applying a human touch.

#### **This session will teach banking executives:**

- A deep dive into the future of digital-first banking and how banking providers need to prioritize customers
- How to create a digital-first culture throughout your organization while still prioritizing “the human behind the screen” (both customers and employees)
- How to navigate the delicate balance between digital and personal, regardless of channel
- Real-world experiences of banks and credit unions that have successfully blended technology and human experiences together
- How data and AI can be your biggest ally when personalizing and humanizing experiences in digital channels

## The AI Revolution: Unleashing the Power of Data to Personalize, Predict & Profit

### Rex Briggs

Chief AI Officer at **Claritas**



AI is a game-changer, and its transformational impact on the banking sector cannot be overstated. This session will demystify the intricacies of AI, as you explore the groundbreaking technologies and latest innovations in artificial intelligence that are completely reshaping the future of banking.

You’ll see case studies and learn actionable strategies that are driving innovation and growth at an unprecedented pace. We’ll also unpack results from new research covering multiple industries showing how to double conversion rates and other critical KPIs.

#### **This session will teach banking executives:**

- How to remain competitive in today’s rapidly evolving landscape by successfully integrate AI into your growth strategy
- The strengths, weaknesses, limitations and creative potential of artificial intelligence in financial marketing
- How to apply AI effectively and responsibly with hands-on, applicable marketing strategies (e.g., “next best product” recommendations, cross-selling, and upselling)
- How to leverage AI to enhance your CX strategy, personalize interactions, improve customer satisfaction, and foster deeper connections
- How to create efficient AI workflows with strategies that streamline marketing operations, reduce costs, and increase productivity
- How to handle complex data and queries with database vectorization and multimodal systems
- A risk framework for AI focused on precision and input control, and where it is especially important to be cautious

# How-To Strategy Sessions

## Navigating the Future of Partnerships in Banking: Strategies for Success

### Bill Dworsky

Senior Manager at Deloitte



The convergence of banking, payments, retail, consumer technologies, travel, and healthcare have created new competitive threats for financial institutions, but also enabled more integrated value propositions outside traditional offerings. Meanwhile, innovative new technologies and APIs have made connections with third-party partners easier and faster, opening up a whole new world of opportunities for community banks and credit unions.

Still, not all partnerships are created equal, and not all have happy endings. Many stagnate or die altogether. So what should financial institutions do to position themselves more strategically and successfully to take advantage of partnerships? In this panel discussion, leaders from across the ecosystem will discuss the critical issues and share their experiences with partnerships of all shapes and sizes.

#### **This session will teach banking executives:**

- How expanding partnerships help banking providers address top-line revenue pressures and develop new pathways to growth
- Ways to create win-win partnerships and how to align incentives in deal construction
- How to enter and exit partnerships — keys to success as the business evolves
- Where partnership-enabled innovation is happening now, and where will it be going over the next five years
- Why strategically balancing standardization vs. customization is key when managing a portfolio of partnerships
- Why partnering will matter more in the future, particularly where banking and payments intersect

## The ROI of CX: Success Strategies from Banking's Best

### Brandon Gerena

Former leadership executive with  
**IBM, Accenture and Razorfish**



Banks and credit unions still struggle with CX despite pouring billions into experience management tools, new marketing technologies, data analytics and personalization platforms. This session will show you how to overcome the competing priorities that stifle cooperation between internal stakeholders by creating a shared CX vision with actionable success metrics across customer touchpoints. You'll see how some of the world's most respected financial institutions deliver an experience that consistently engages and delights, including USAA, American Express, Barclays, and Goldman Sachs.

#### **This session will teach banking executives:**

- How to reframe business objectives around CX metrics for customer growth and retention
- How to engage relevant stakeholders in end-to-end CX management
- How to prioritize new features, products, and marketing campaigns all focused around CX
- Opportunities to launch tangible “minimum viable products” (MVPs) that achieve near-term results with measurable business outcomes
- How to repurpose and upskill existing human resources to support CX
- The importance of every employee in understanding customers and utilizing data
- How to identify “moments that matter” across various banking functions

# How-To Strategy Sessions

## Winning in Digital Banking Channels: Leading UX Practices from across the Globe



**Mark Donohue**  
Founder of **iSky Research**

This session will show you how banking providers are differentiating themselves in digital channels as they raise the stakes with innovative CX, security, marketing and sales strategies.

Founded on one of the world's most comprehensive and longest-running longitudinal studies examining over 80 different benchmarks, you'll explore the designs, experiences and tactics that are driving positive outcomes for customers and financial institutions via web and app UX.

Take this candid, behind-the-scenes tour of what actual banking customers across the U.S. and around the world experience *after* they've entered their online banking and mobile app passwords.

### **This session will teach banking executives:**

- The latest digital banking trends, including new innovations, new features, updates, changes, and additions
- The digital banking experiences that are resonating the most with today's consumers
- The differentiators vs. tables stakes in today's digital banking game
- How digital is shaping the trajectory of the customer lifecycle
- The latest digital practices in onboarding, servicing and selling

## Marketing & Leadership Lessons from the World's Most Influential CMOs



**Eric Fulwiler**  
Co-Founder & CEO at **Rival**

If you could sit down with the world's most successful CMOs, what could you learn? That's what Eric Fulwiler did. In this session, Eric will share the insights, big ideas, leadership lessons, and habits he learned while interviewing 100 notable CMOs from some of the biggest brands in the world, including Mastercard, PepsiCo, Procter & Gamble, and GE. You will also hear principles and practices driving the careers of CMOs at category disruptors like Mint Mobile and Hyperloop.

### **This session will teach banking executives:**

- The attributes and qualities it takes to be a world-class CMO — innovative, creative, agile, and adaptable
- The mindset and habits of all great CMOs, regardless of their industry or their company's level of maturity
- How successful CMOs demonstrate the impact of marketing on their organization's bottom line
- How the best CMOs build and maintain strong brands
- How effective CMOs build consensus and collaborate with adjacent departments
- How any marketing leader can apply the lessons and insights of world-class CMOs

# How-To Strategy Sessions

## The BaaS Revolution: Leveraging Embedded Finance as a Catalyst for Growth



**Peter Hazlehurst**

CEO & Co-Founder of **Synctera**

Embedded finance isn't the future, it's happening right now, and Banking as a Service isn't just for megabanks. In fact, community banking providers are the driving force behind the embedded finance revolution. Over 78% of financial institutions actively engaged in BaaS have less than \$10 billion in assets, and one-third have less than \$1 billion.

In this session, you'll see how financial institutions of all sizes benefit from BaaS and embedded finance programs that create significant growth opportunities and drive increased engagement.

### **This session will teach banking executives:**

- How to build a BaaS program to support embedded finance programs at scale, and the best ways to get started
- The crucial role every department — including compliance, operations, finance, risk — must play at every step of the BaaS journey
- Real-world examples of businesses leveraging BaaS for embedded finance solutions and innovative “super app” experiences
- The big trends and latest regulatory concerns shaping the future of BaaS and embedded finance
- The technology and talent it takes to ensure a risk and compliance framework that is “best in class”

## Engagement Marketing: Taking Data-Driven Personalization to the Next Level



**Jody Bhagat**

President at **Personetics**

Digital advertising can be expensive, and the ROI is often disappointing. Banner ads like “Open a Savings Account” and “You’re Approved for a Credit Card” have click rates below 1% with conversion rates that are worse — even with effective modeling. That’s why financial marketers have personalized interactions with insights tailored to individuals based on their transaction data. But that’s just the beginning.

This session will show you how to take your personalization strategy to the next level. You’ll learn how to go beyond the basic “advice + insights” personalization model by augmenting offers with evidence that demonstrates how customers will benefit from taking action. You’ll see real-world examples in banking, and the positive impact this advanced personalization strategy has on customer engagement, loyalty and profitability.

### **This session will teach banking executives:**

- How to combine personalized insights with evidence-based offers into an ultra-effective, hyper-efficient marketing strategy
- Why customers respond better to an offer when they feel it is in their best interest
- How to effectively deploy Personalized Engagement Marketing offers that can double conversion rates
- Advancements in data analytics that make Personalized Engagement Marketing possible
- Best use cases for Personalized Engagement Marketing
- The martech stack to deliver on Engagement Marketing

# How-To Strategy Sessions

## Data-Driven Strategies to Optimize the Retail Banking Experience

**Kurt Klassen**  
EVP at **LEVEL5**



When it comes to your retail delivery model, there is no margin for error — literally. You need a deliberate, holistic approach that ensures you're headed in the right direction for 2024 and beyond.

This session will show you how to effectively reimagine the components of your retail experience, including branch design, CX, staff roles, and technology. You'll learn how to orchestrate a data-centric retail strategy that balances the local market preferences, branch models, demographics, and technologies required for success.

### **This session will teach banking executives:**

- How to differentiate your experience from competitors by aligning your network strategy around customers and the markets you serve
- How to identify future markets, recognize local demand for banking products and services, and ultimately what that means in terms of loan and deposit growth
- How to understand the performance of your existing branches, and how to identify the coverage model and branch types that will best serve your target audience
- How to accurately gauge the performance of your existing branches, and how to identify the optimum location for your branches to fuel future growth
- How to identify concentrations of your best and most profitable customers in both existing and new markets
- Innovative technologies you can seamlessly integrate into your branch environments and differentiate your experience from competitors

## Deposit Growth & Retention Strategies in a Falling Rate Environment

**Adam Stockton**  
Managing Director at **Curinos**



With falling rates in the forecast, many bankers are breathing a sigh of relief. But rate sensitivity is not going away, and competition for deposits will remain challenging in 2024 and beyond. In order to win, banking executives need to ensure consistent and accurate measurement of deposit value — which deposits are worth spending scarce marketing dollars to acquire, and which are worth using rate to defend?

This session will show you how to tackle the specific deposit challenges you'll face in a falling rate environment. You'll see how the right CD strategy will balance retention and interest expense, and how to contend with checking and low-cost savings deposits as they migrate into higher-cost MMDA and CDs.

### **This session will teach banking executives:**

- How deposit value will shift and evolve over the next two years
- How to build a plan that maximizes deposit efficiency in a cost-constrained environment
- The tactics financial institutions have used to drive above average deposit growth at below average cost
- How to avoid attrition of valuable deposits, and the specific risks associated with pricing down in a falling rate environment
- How banking providers need to recalculate their marketing ROI in an environment where deposit value has increased

# How-To Strategy Sessions

## The Future of Open Banking & The Customer Retention Challenge

**Alex Johnson**  
Founder of **Fintech Takes**



For decades, banks have prioritized acquiring new customers over retaining existing ones. Loyal customers who felt this was unfair weren't likely to close accounts in protest, because switching was a such a hassle. But that's about to change. Advancements in open banking technology will make switching banking providers as easy as pressing a button.

Traditional financial institutions who have relied on inertia as their primary retention strategy are in for a massive wake up call. In this session, you'll see how open banking is challenging traditional banking providers, and why they will need to work harder to retain customers by offering better, more personalized and automated financial services.

### **This session will teach banking executives:**

- How financial institutions must completely rethink customer loyalty and retention in the era of open banking
- Why consumer permission will be the key that unlocks improved customer retention
- Where the opportunities for product innovation will be in a more competitive market
- How generative AI can (and will) play an increased role in consumers' product discovery and research processes
- How open banking may continue to evolve (past the initial 1033 rules) and the threats and opportunities that this evolution will pose

## Data-Driven Loyalty: How to Engage & Retain Banking Customers

**Joe Welu**  
CEO of **Total Expert**



Traditional financial institutions constantly fight a war of attrition. But to effectively engage loyal customers, every banking executive must understand how consumers' demands are evolving, and how to effectively meet these needs.

In this session, you'll see what modern consumers seek from financial partners, and the crucial role data plays in shaping banking relationships. You'll learn how to identify and respond to shifts in consumer loyalty, and which engagement strategies yield the greatest benefits. We'll also explore the latest tools and technologies you can leverage to enhance customer engagement and foster loyalty.

### **This session will teach banking executives:**

- The crucial importance of leveraging data analytics to deepen customer relationships and foster loyalty
- How to effectively segment and prioritize your customer base, and where to focus your engagement efforts for optimal retention
- How to recognize critical moments in a customer's financial journey and when to intervene for maximum impact
- Techniques to detect changing customer expectations and how to adapt your engagement strategies accordingly
- How to effectively tailor your engagement strategies to appeal to diverse demographic segments
- How to foster a culture of customer-centricity in your institution that prioritizes customer needs and satisfaction

# How-To Strategy Sessions

## Digital Identity Verification: A Competitive Advantage for Banks & Credit Unions

**Sara Seguin**

Principal Advisor/Fraud & Identity Risk at **Alloy**



As digital banking strategies have become increasingly sophisticated, financial institutions are forced to address a complex array of new challenges surrounding identity risk. But effective identity verification should do more than mitigate fraud. It should help fuel growth.

In this session, Sara Seguin, the former Head of Enterprise Fraud Strategy at KeyBank, will share the challenges and lessons she's learned implementing streamlined and efficient digital identity verification processes. She'll show banks and credit unions how a seamless and secure digital onboarding process can become a competitive point of differentiation that attracts more customers.

### **This session will teach banking executives:**

- How to solve for identity risk across the customer lifecycle while cultivating a strong digital user experience
- How banks can use verified customer data to offer tailored financial products and services, increasing cross-selling and upselling opportunities
- How to cultivate a partnership between the Business and Fraud/AML teams to effectively increase growth and revenue opportunities while mitigating risk
- How to implement real-time fraud controls that give you the clearest picture of your customers' identities at onboarding
- How identity verification can be expanded beyond traditional compliance requirements

## The Evolution of Branch Banking: Lessons from Retail Innovators

**Kevin Blair**

CEO of **NewGround**



Has digital banking killed traditional branches? While brick-and-mortar branches are no longer a necessity for many modern banking consumers, it's not about eliminating retail locations. It's about how the stores you retain in your retail portfolio adapt to consumers' needs and preferences in the Digital Age.

To find the path forward, banks and credit unions must look for inspiration in other verticals. In this session, you'll see how retailers like Starbucks, Microsoft, Panda Express, and Blue Nile use retail branding, storytelling techniques, and breakthrough marketing strategies to attract and engage modern consumers.

### **This session will teach banking executives:**

- How to fuel growth by embracing new ideas and borrow innovative retail concepts from outside banking
- What brick-and-mortar strategies are thriving in the Digital Age and why
- How retailers and businesses in other markets engineer their physical experience to draw in new consumers
- How inspirational ideas from other retailers can be applied to banking in practical and tangible ways
- How to integrate local culture, demographics, and evolving generational perspectives into your retail strategy

# How-To Strategy Sessions

## Maximizing Customer Lifetime Value Through Financial Wellness

**Vibhas Ratanjee**

Senior Practice Expert/Finance at **Gallup**



When a financial institution helps improve people's financial wellbeing, it fosters trust and loyalty. Customers who receive valuable financial guidance are more likely to stay with their banking provider for future financial needs, significantly increasing their lifetime value (LTV). Furthermore, as customers become more financially stable and confident, their increased banking activity translates into more deposits, lending opportunities, and increased investment activity, which in turn boosts your revenue.

This session will show you how to turn a financial wellness strategy into a growth engine for your financial institution. You'll see case studies illustrating how banks, credit unions, and fintechs have leveraged a financial wellness strategy to increase customer engagement and improve their bottom line.

### **This session will teach banking executives:**

- The three pillars of a financial wellness strategy — digital adoption, channel consistency, and high-quality conversations surrounding financial advice on wellbeing
- How banks need to define “financial wellbeing,” and why financial wellbeing is entirely centered around consumers' emotional relationship with money
- Key strategies for driving a higher sense of customer wellbeing
- How improving customers' financial wellbeing translates into greater cross-selling opportunities (e.g., higher interest rates for savers, investment platforms, or debt consolidation loans)
- Innovative third-party tools and white-label platforms that banking providers should consider integrating into their financial wellness strategy
- The latest trends on the state of financial wellbeing in the banking sector

## Human-Centered Connections: Customer Engagement in the Digital Era

**Becky Smith**

EVP/Chief Revenue Officer at **SECU (\$4B)**



Consumers communication preferences are complicated. Financial institutions need to strike a delicate balance between high-touch and digital interactions with strategy that factors when and how often people want to receive different types of messages in the channels they prefer.

This session will show you how to build a multi-channel communications strategy encompassing email, social media, SMS, chatbots, and other media, along with real-world case studies demonstrating the impact this strategic approach has on growth.

### **This session will teach banking executives:**

- Techniques for creating an immersive brand experience with a focus on human connections
- Insights into reducing your organization's operational costs and environmental footprint through optimized engagement strategies
- The importance of choice in communication channels, and the specific channels people prefer for different types of communication
- How the right combination of high-touch and digital interactions can foster trust and credibility in the financial sector
- How to analyze data, demographics, and past interactions to segment your audience based on their channel preferences
- How to leverage people's communication preferences to boost cross-selling opportunities
- Metrics and KPIs to measure the success of high-touch and digital integration in driving growth

# How-To Strategy Sessions

## The Ethical, Legal and Strategic Risks of AI in Banking

**Lance Senoyuit**

Senior Principal/Financial Services at **SAP**



Everyone has heard about the opportunities and promise of AI in banking. And everyone has been cautioned about the unintentional discriminatory bias that can be baked into AI algorithms (think: “accidental redlining”). But what about the other risks?

This session will explore the potential downsides of AI in banking. You’ll hear scenarios your risk mitigation team needs to plan for — the ideas criminals and malicious actors are plotting right now, from misinformation/disinformation campaigns to spoofing and phishing attacks.

### **This session will teach banking executives:**

- How AI can be exploited to harm bank and credit union brands — directly or indirectly
- How AI-powered models can yield unintentional but devastating outcomes
- The privacy, security, and regulatory risks presented by AI-powered tools
- How a platform like AutoGPT could be leveraged to inflict harm on a specific institution and/or the wider banking industry
- The brand and reputational risks associated with “deepfake” technologies
- How to anticipate, address, and ward off these threats
- Where AI presents KYC and GDPR risks
- How artificial intelligence could be leveraged to launch DDoS attacks

## Using Gamification to Drive Growth in Banking

**John Findlay**

CEO of **LemonadeLXP**



Are you ready to level up your growth strategy game? Dive into the world of gamification and learn how to leverage its power to achieve a range of growth objectives. From acquiring new customers and boosting deposit growth to driving digital adoption and usage, enhancing financial wellness, and motivating staff to become growth champions, this session will cover it all. Get ready to unleash the power of gamification to drive growth at your financial institution.

### **This session will teach banking executives:**

- How to acquire new customers through gamified marketing programs — from captivating challenges to personalized incentives
- How to turn prospects into customers who are eager to engage with your financial institution
- How to boost deposit growth using gamification techniques like goal-oriented savings challenges and interactive rewards systems
- Innovative approaches to driving digital adoption and usage using game-based marketing and education tactics
- How to teach and promote financial wellness through interactive challenges, empowering customers to make informed decisions and achieve their financial goals
- Performance-based incentive strategies, gamified training, and recognition programs that engage and motivate staff to become proactive drivers of growth

# How-To Strategy Sessions

## Reimagining Retail Banking: How to Revolutionize CX with Generative AI

### James Dean

Global Generative AI Specialist,  
Financial Services Lead at **Google**



Generative AI represents a critical turning point in the future of retail banking, and understanding its potential is crucial for any financial marketer looking to stay ahead of the curve.

This session will explore the many ways in which Generative AI can be harnessed to create a differentiated customer experience and unlock new possibilities for growth and innovation. You'll see the tangible benefits of Generative AI solutions, and showcase concrete, real-world examples that will help you maximize the impact and ROI of this emerging technology.

### This session will teach banking executives:

- How to identify specific customer pain points and opportunities best addressed by Generative AI
- How to build generative AI search and conversational AI experiences with text, voice, images, and video that help customers and employees quickly get relevant information
- How to automate complex tasks to proactively answer customer questions, resolve common issues, and automate routine processes, freeing up human advisors and service reps/analysts to focus on high-value interactions
- How to enhance financial literacy by creating interactive simulations and personalized learning experiences
- How to develop innovative financial products and generate new ideas based on real-time market data and customer insights
- How to build a roadmap for successful Generative AI integration within your existing technology infrastructure technology

## Next-Generation Retail Delivery Strategies in Banking

### Sam Kilmer

Managing Director at **Cornerstone Advisors**

### Jim Burson

Partner at **Cornerstone Advisors**



For the last 20 years, retail delivery strategies in banking have focused on redirecting expensive branch traffic and contact center volume to lower-cost digital channels. But today, retail delivery is about more than just improving efficiency and cost savings.

This session will address the complexity of rapidly changing customer behaviors and expectations, as two former banking and fintech executives show you how to improve the service experience in banking with research-based delivery strategies.

### This session will teach banking executives:

- How to create a next-generation delivery model with a go-to-market strategy that will differentiate your financial institution from the competition
- How to effectively integrate the three pillars of future delivery — digital tech, martech, and outreach — to create a personalized experience
- Proven methods to determine, forecast, and support a self-service sales model that grows business across relevant target markets
- How to grow business across relevant target market segments and create revenue based on more than price
- How to build the right strategy from a combination of options including traditional delivery, fintechs, and embedded finance
- How to pick the right investments and partnerships needed to remain relevant in the marketplace

# How-To Strategy Sessions

## Redefining SEO in the AI Age: Roles, Goals & Metrics for a New World

**Wil Reynolds**

VP Innovation at Seer Interactive at **Seer Interactive**



SEO has been an elusive target for over 20 years, forcing financial marketers to continually pivot and develop new skills. Get ready for the ride, as we show you how AI is going to completely rewrite the rules of the SEO game yet again.

In this session, you'll see the crucial role SEO will play on your bottom line, how AI is going to reshape your content strategy, and how to time your investments accordingly. We'll also teach you how to track your visibility in AI-powered search as we explore the impact of generative AI on search platforms and what that means to your financial institution's web traffic.

### **This session will teach banking executives:**

- How to protect your brand and ensure you maintain maximum visibility in AI-powered search engines
- How to track your competitors who are producing and ranking with AI content and how you compete with them.
- How to benchmark competitive threats and relative market share on AI-powered search platforms
- How to detect when your customers are hitting inflection points in their use of AI-powered search vs. traditional search engines
- How to uncover new sites and different tools your customers will be using to find answers

## Unlocking What People Really Want from Financial Brands on Social Media

**Mark McDonnell**

Social Media Strategy Expert at **Hootsuite**



Anyone who works in banking knows: you're in the relationship business. But the brutal truth? If people don't like the content your financial institution is putting out on social media, they will take active steps to avoid it, and most platforms make it easier than ever to put you on "mute."

This session will show you how to avoid the common pitfalls banks and credit unions make with their social media strategies. You'll learn how financial marketers should utilize social media channels to foster relationships and create engagement at scale while staying compliant and keeping their brands safe.

### **This session will teach banking executives:**

- How to create entertaining content that financial consumers will actually engage with on social platforms
- Steps to mitigate social brand risks and increase the security of your social media assets
- Real-life financial brands that are succeeding in social channels (e.g., Monzo, Chime, Wealthsimple, TD, and others)
- The importance of balancing AI and the human touch to keep your financial brand as authentic as possible
- How to ensure compliance and brand safety concerns don't suck the life out of you and your social media campaigns
- Key metrics for tracking the success of your social media campaigns

# How-To Strategy Sessions

## The Brand Advantage: Harness Your Most Valuable Asset to Drive Differentiation

### Gina Bleedorn

President and CEO of **Adrenaline**



Your brand is one of the most powerful — but often overlooked — assets on your balance sheet. A powerful brand strategy that differentiates your financial institution from the sea of competitive sameness catalyzes growth and maximizes business value. And in this session, you'll see the data that proves it.

Explore the business advantages of branding, as you delve into the critical considerations and metrics that matter in tracking ROI. Drawing on real-world case studies of banks and credit unions that recently rebranded, you will hear best practices that will maximize the impact of brands across all constituencies.

#### **This session will teach banking executives:**

- How to craft a brand strategy that drives business value and creates a competitive advantage
- How to identify and amplify the strengths of your brand's DNA with a proven methodology to create true brand differentiation (the 'Five Whys' method)
- How to build an airtight business case for brand change and evolve the core elements of your brand to support growth goals
- How to define the KPIs and success vectors of your brand strategy
- How to drive internal advocacy across your organization, and leverage your brand to ignite growth from the inside out

## The Future of Retail Banking: Growth Strategies in an Age of Industry Convergence

### Kristin Korzekwa

Managing Director at **Hootsuite**  
and a former VP with **SunTrust** and **National City Bank**



Traditional banking providers have been rocked by volatile macroeconomic trends and massive shifts in credit markets while also contending with a slew of fresh competitors from all angles. These forces will only accelerate the pace of consolidation in the banking sector.

In this new competitive landscape swirling with uncertainty, what can—and should banking providers do to fuel growth? This session looks at the future of retail banking through the lens of industry convergence, showing you how to pivot and strategically position your brand successfully in the marketplace.

#### **This session will teach banking executives:**

- How to identify new growth opportunities on the edge of conventional boundary lines in the banking sector
- How to shape new value propositions for consumers whose expectations of banks are increasingly set by organizations outside financial services
- How to adapt and proactively develop strategies more commonly used by non-traditional competitors
- How to create competitive differentiation by creating digitally-enabled omnichannel customer engagement
- How to develop new analytical capabilities that utilize non-traditional data sources

# Registration Details



Sign up today and get a free upgrade to a **Gold Pass** worth \$870.00!

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

The **Forum+** on-demand video channel gives you **24/7 access** to video recordings of all **Forum 2024** keynotes and breakouts\*, with **150+ bonus sessions** — **a \$695 value!**

## Free ticket to see **Jim Gaffigan!**

Don't miss legendary comedy all-star **Jim Gaffigan** on Monday, May 20, with his private stand-up performance exclusively for **Forum 2024** attendees opening night — **a \$175 value!**

**Register now and pay nothing until March!**



## Included with your registration!

- All-access conference pass** allowing you to attend all keynotes and breakouts.
- Forum 2024 Digital Toolbox** loaded with 2GB of valuable white papers, research reports and eBooks.
- Digital copies of slide decks from **all session presentations**.
- Free copies of the **2025 Digital Banking Trends & Predictions Report** and the **State of Financial Marketing Report**.
- Invaluable networking opportunities with best and brightest in banking — **over 3,000 senior leaders** in financial services!
- Three fully hosted networking **cocktail receptions**.
- Two hearty breakfasts and two gourmet lunches (no cheap “continental breakfasts” or boxed lunches).
- You'll get your money's worth just from the materials you take home!

**Banks + Credit Unions \$2,695**  
Total savings of **\$1,170.00**

**REGISTER BY APRIL 4TH TO SAVE BIG!**



**Includes Our Covid Guarantee**

\* 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 **April 4th** to get the **Final 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 ENDS DECEMBER 7, 2023	SPRING DISCOUNT ENDS FEBRUARY 22, 2024	FINAL DISCOUNT ENDS APRIL 4, 2024	REGULAR PRICE ON-SITE STANDARD RATE
	<b>\$2,295</b> Includes a free upgrade to a <b>Gold Pass</b> . Total savings of \$1,570.00	<b>\$2,495</b> Includes a free upgrade to a <b>Gold Pass</b> . Total savings of \$1,370.00	<b>\$2,695</b> Includes a free upgrade to a <b>Gold Pass</b> . Total savings of \$1,170.00	<b>\$2,995</b> Add a <b>Gold Pass</b> for \$500.00
	EARLY BIRD ALUMNI DISCOUNT ENDS DECEMBER 7, 2023	SPRING ALUMNI DISCOUNT ENDS FEBRUARY 22, 2024	FINAL ALUMNI DISCOUNT ENDS APRIL 4, 2024	REGULAR PRICE ON-SITE STANDARD RATE
Past Attendees (Banks and credit unions only)	<b>\$2,095</b> Includes a free upgrade to a <b>Gold Pass</b> . Total savings of \$1,770.00	<b>\$2,295</b> Includes a free upgrade to a <b>Gold Pass</b> . Total savings of \$1,570.00	<b>\$2,495</b> Includes a free upgrade to a <b>Gold Pass</b> . Total savings of \$1,370.00	<b>\$2,995</b> Add a <b>Gold Pass</b> for \$500.00
Group of 3+ Each person gets a free upgrade to a <b>Gold Pass</b> (Banks and credit unions only)	GROUP DISCOUNT - ENDS APRIL 4, 2024			
	<b>\$1,995</b> Save \$1,000.00 per person!			
Vendors, Consultants, Analysts, Suppliers, Associations and Everyone Else Includes automatic upgrade to a <b>Gold Pass</b> . Limited to 100 attendees in this category.				<b>\$2,995</b>
Attendee Companion Pass Includes 2x breakfasts, 2x lunches, 3x receptions, and ticket to Jim Gaffigan's performance for your spouse or traveling companion.				<b>\$695</b>

\* 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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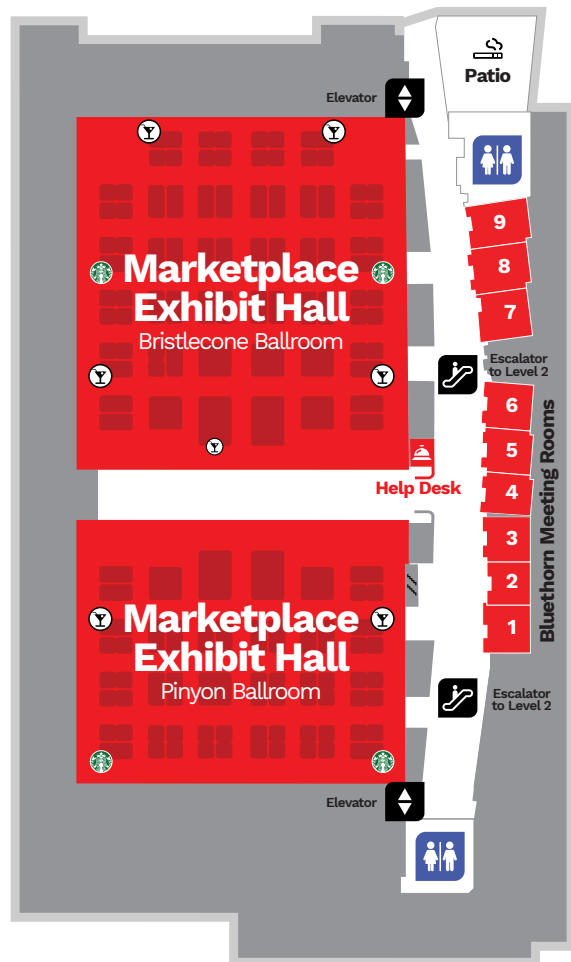
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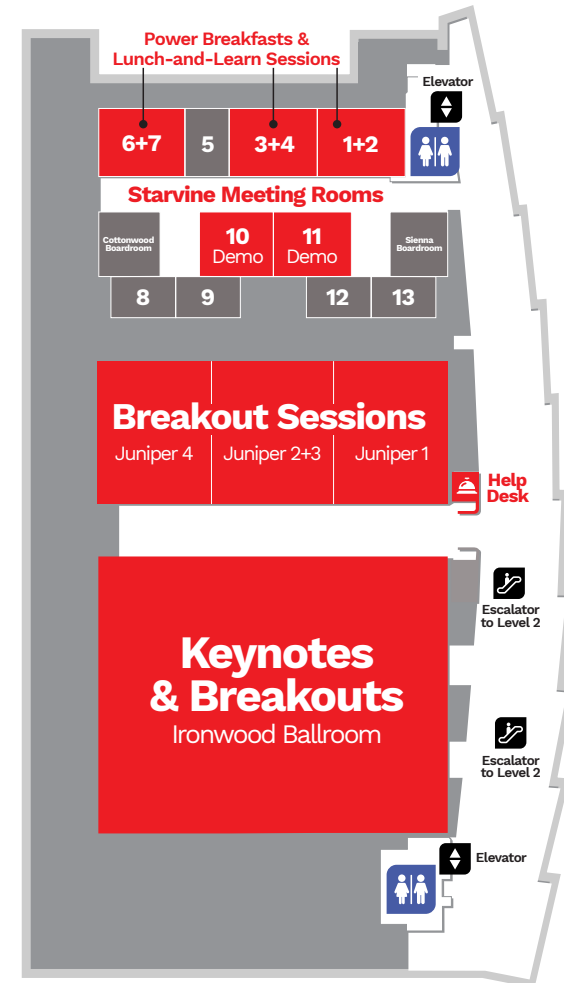
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