

The Client

THURSDAY 11 MARCH – VIRTUALLY

THE SCHEDULE

(All delegates are invited to choose the roundtables in which they wish to participate. The roundtables are then scheduled in order to facilitate the maximum satisfaction of delegate choices.)

0800-0830	VIRTUAL COFFEE AND NETWORKING	An opportunity to network over “home-made” coffee in small curated groups or pre-scheduled one-to-ones via Zoom rooms. You will have been invited to make your meeting choices and they will be visible in your personalised itinerary. We will ensure you know what to do!		
0830-0850	PRESENTATION	WELCOME - INCORPORATING THE RESULTS OF THE SCENE SETTER RESEARCH		
0850-0910	PRESENTATION	KEYNOTE: Caroline Burkart, Head of UK/Europe, Client Insight at Aon will present findings from Aon’s 2020 UK Client Experience Benchmark showing what we have learned about the client experience since Covid 19 and what we need to do to build on these findings in the coming year. In line with the conference theme, her speech will focus particularly on the online aspect of the client experience.		
0915-1015	STRATEGIC ROUNDTABLES Interactivity is the key	So how do you do it all without a need for a huge investment and substantial business disruption? We believe we know how. Meet your digital workers!	Operational resilience – it’s all about your clients.	Reddit all about it! Are you thinking about your clients of the future? Are you leveraging the tech to ensure they are plugged into you?
1015-1025	COFFEE	An opportunity to grab a coffee or a herbal tea, stretch and/or powder your nose before rejoining us for the upcoming entertainment!		
		TechTalks: Short and punchy presentations from our fintech companies to tell you what they do within the space of ten minutes tops. Their brief is to entertain and educate rather than pitch! The clock will be ticking.		
1025-1035	TECHTALK	YOU'RE ON MUTE! - Here’s the thing. Your clients don’t want paperwork. It’s hard to keep organised and they can never find it when they need it. They get too many emails and sometimes they ignore yours. They know about phishing attacks and cyber security. They worry about this. - Your clients really value the peace of mind you bring them by looking after their wealth. Why not give them peace of mind that all of their paperwork and communications are looked after too? - Tessa Lee, Operations Director at moneyinfo will show you how to secure all your communications, deliver a better client experience and ensure your message is being heard.		

1035-1045	TECHTALK	PRIVATE MARKETS MATTER TO YOUR CLIENTS... AND THEY SHOULD MATTER TO YOU, TOO. The changing demographics of wealthy clients has been a core driver of increased demand for private markets in the last decade. As a result, offering access to alternative investment opportunities has arguably never been more important for financial institutions. <i>David Newman, CCO and Co-Founder of Delio</i> , will explain why wealth managers are adapting their proposition and client experience to make the most of the opportunity.		
1045-1055	COFFEE	An opportunity to grab a refill		
1055-1155	STRATEGIC ROUNDTABLES Interactivity is the key	The ultimate Track and Trace: a look at new technology to identify and engage with valuable new clients.	Leveraging platform technology to minimise the risks and costs a wealth manager incurs in offering private markets investing to their clients.	How can wealth managers convert interactions into client engagement to drive real value in the relationship?
1200-1210	TECHTALK	IT'S TECH JIM, BUT NOT AS YOU KNOW IT! WHAT DOES AGILE HAVE TO DO WITH GROWING YOUR CLIENT BASE? <i>Adam Jones is the MD of ADA</i> , Redington's technology business. In his talk, Adam will demonstrate how ADA can: <ul style="list-style-type: none"> - help technologists and investment teams speak to each other; - demystify a load of buzzwords; and - show you how Agile software development is a great framework for client experience and engagement in the wealth management market. 		
1210-1235	PRESENTATION	KEYNOTE: Paul Johnson, Director of the Institute of Fiscal Studies will share his thoughts into how your clients will be affected by the preceding week's budget.		
1235-1240		THANK YOU AND WAVE GOODBYE!		
1700-1745	MORE VIRTUAL NETWORKING	EVENING DRINKS. They will be provided! A mix of pre-scheduled one to one meetings and ad hoc chit chat!		