

MORTGAGE a meeting of MINDS

Thursday 24 October 2024

Royal College of Physicians, 11 St Andrews Pl,
London NW1 4LE



imagine a day WHERE YOU...

one

Spend your time in the company of some **50 potential very senior clients** – all of whom have carefully been identified and invited personally. A balance of whole of market broker firms (both traditional and online), banks, building societies, mortgage networks and clubs. All at C suite.

two

Hold one-to-one meetings with them; speed **network**; sit with them over a very civilised lunch; understand their thinking, business strategy and issues so that you can prepare to respond to them.

three

Discuss the **strategic issues** affecting your industry both at a macro level and a more granular level – small pre-researched roundtable groups in private rooms observing Chatham House rules. Lead your own roundtable.

four

Understand the **key data points** within the industry in terms of sentiment and financials and, where relevant, how they compare with other FS sectors.

five

Hear **inspirational** and **informative keynotes**. Hear from **disruptive technology innovators**.

six

Promote awareness of your business via branding and marketing activity carried out on your behalf.

seven

Follow a **personalised itinerary** built ahead of the day around your thought-through choices. All operated from an easy to use app.

your opportunity to sponsor A MEETING OF MINDS

We invite you and your firm to be one of a group of **ten sponsor firms**. You will be a lender; a tech provider; or a service provider – all with a need to understand and build relationships with your client base – to **increase business**.

We offer a **clear cut all inclusive and transparent fee structure** (prices start from £6,000+VAT)

Mortgage Meeting of Minds will take place at **The Royal College of Physicians** which provides **the levels of service and style you would expect**.



there's a lot TO DISCUSS

The world of mortgages is going through a particularly uncertain period at the moment. After several years of very low interest rates and low inflation ... well let's say the times they are a changing.



How do you price products when you are not sure what new economic cataclysm lies around the corner? Your end customers are struggling with affordability. The actual number of properties on the market is slowing as everyone holds their breath. And the whole process of trading houses is so slow it is acting as a brake on economic activity.

We also have a backdrop of changes in the whole house buying ecosystem. The number of houses being built appears insufficient to keep pace with the increase in population. The infrastructure is creaking.

Post pandemic, people's working practices have changed and this impacts how and where they want to live.

And then of course there is the drive for Net Zero and the pressure to adhere to Government energy regulations. And the new proptech kids are rocking the boat! **There is a lot to discuss!**

Please click here to see the **DRAFT AGENDA** detailing suggested roundtable topics

who are OWEN JAMES?

Owen James has been
**organising strategic events for
the financial services industry
for approaching 18 years!**

We have weathered the odd financial crisis and pandemic! And we feel fairly confident we can provide good references. **Our goal has consistently been to act as an enabler for firms who want to do better business** – commercially, intelligently and ethically. Hopefully our longevity proves that we have had some success.

A Meeting of Minds is our flagship programme of biannual events which brings the most senior decision makers from the client facing side of a particular sector of financial services (the delegates) together with those firms who manufacture the products they sell and those firms who support them with innovative solutions and services (the sponsors). Together they examine the key strategic issues facing the industry and seek to table solutions.

Please click here to see the full
SPONSORSHIP OPPORTUNITIES for 2024

the delegates WHO ARE THEY?

Identifying and inviting the delegation. Fundamental to the success of A Meeting of Minds is the way we go about inviting the delegation – your potential customers. They are invited as individuals. We research them carefully to ensure they fulfil our criteria i.e. they must be at least Director level – we aim for C suite – and they must hold executive decision-making powers.

Firms we will be looking to invite are those from the large Independent Mortgage Brokers including; online, mortgage networks and mortgage clubs, as well as, the client facing teams at the banks and building societies - all at board level.



Some examples of the firms
we will be inviting:

INDEPENDENT MORTGAGE BROKERS (inc. online)

*Habito, John Charcol, Trussle,
Mortgage Advice Bureau, Right Mortgage*

MORTGAGE NETWORKS

Dragon Network, Stonebridge

MORTGAGE CLUBS

*Dynamo for Intermediaries,
Mortgage Intelligence*

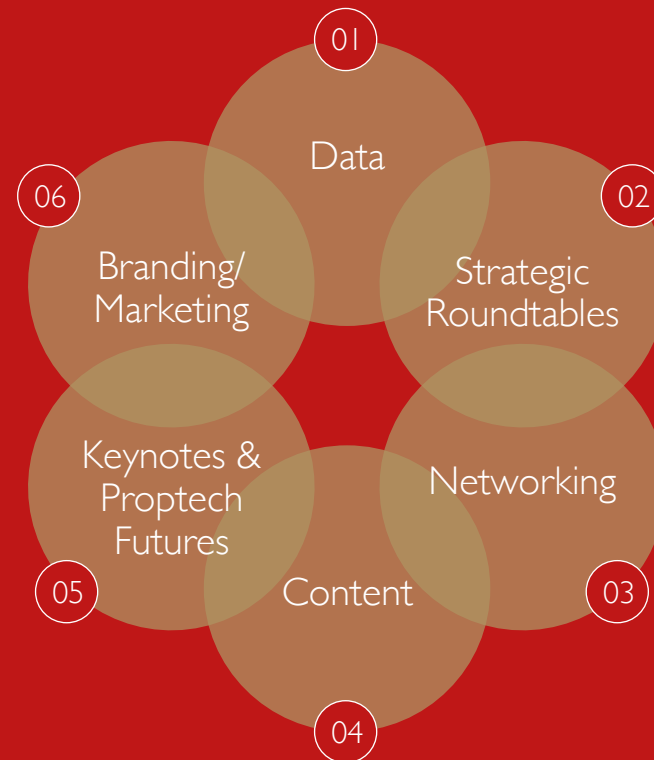
We will also identify the people within the **banks and building societies** who are responsible for the customer interface.

a six month ENGAGEMENT

Owen James events aren't on-off experiences, we are working with you to ensure you maximise the opportunity throughout.

THE POWER OF SIX

A Meeting of Minds incorporates SIX key elements to ensure you maximise your return on investment -both financially and timewise



data oils the wheels BEFORE AND AT THE MEETING

The invited audience (the delegation) do not pay to participate. However, the quid pro quo is that we ask them to provide data and profiling information. This enables us to produce a summary report of the industry at a moment in time. We call it the **SCENE SETTER RESEARCH**.

It also means we can compare and contrast with other parts of the FS industry. You will receive the full research outputs before the event thereby enabling you to prepare for the day.

You will also be provided with information around the delegation via the **EVENT APP** which you will be invited to download in advance of the Meeting. This includes personal and company bios as well as photos to aid recognition!

AD HOC POLLING: thanks to the Event App, we are able to question our audience at any stage of the proceedings. This is sometimes done during the keynotes and sometimes during the roundtables. Our experience is that it increases interaction – particularly if used during the roundtables.



data oils the wheels AFTER THE MEETING

POST EVENT FOLLOW UP

You will continue to have access to the app. In addition, you will be provided with an excel (old school) listing of participants' contact details. Owen James stands ready to support any follow up you are struggling with. We undertake to contact up to five people on your behalf.



POST EVENT FEEDBACK REPORT

All roundtable participants are asked to feedback on the roundtables in which they take part. This data is collated for you and provides a benchmark as to the success of your roundtable. Participants in the roundtable are also asked if they would like a follow up call. Again this is collated and passed onto you. More general feedback is collected to give you a sense of the success of the event in general. Transparency is key.

BRAND AWARENESS MONITOR

The delegation are asked how aware they are of your brand. For those of you who have supported past events, we are able to provide this data in trended format.



strategic ROUNDTABLES

An opportunity to roll up your sleeves and find out what your clients are thinking.

All sponsors are invited to lead a roundtable discussion for typically some 12 –15 delegates. These groups are held in private meeting rooms and are strictly Chatham House.

In advance of the Meeting, Owen James produces a **DRAFT AGENDA**. This is written on the back of substantial research amongst participants and will reflect the key issues worthy of discussion on the day.

There may be a subject within the document which aligns naturally with your firm's strategic objectives. If not, you are of course able to propose your own subject and we will work with your team to create a roundtable synopsis which will resonate with the delegation. These roundtables are not an opportunity to pitch, they are an opportunity for you to engage strategically with industry leaders you are keen to impress—to be seen as an expert/thought leader.

strategic ROUNDTABLES



THE DETAIL

Your subject expert will be invited to provide a ten minute introduction before the roundtable is opened up to the group. Ahead of the event, you will be introduced to a facilitator whose role is to ensure everyone “leans in” and to ensure the conversation keeps moving forward.

As the delegation are asked to choose which sessions they want to take part in, you will be engaging with a group who already have an interest in the subject.

The outputs are written up anonymously providing all with a summary of what was discussed. You have the final sign off. They are published as **THE FINDINGS**.

These roundtables last one hour. Your roundtable will take place once. However if it is super popular with the delegates then we will ask if you would like to run it twice. There will be three roundtables throughout the day and you will be offered the opportunity to sit in on the other session(s).

it's good TO TALK

So how do we ensure the networking happens?

Ahead of the event, we will ask you to have a look at the delegate list and cherry-pick up to ten people with whom you would particularly like to have a fifteen minute one-to-one meeting.

From this, we will ensure you are lined up with **two one-to-one meetings**. These will take place over breakfast, morning coffee and afternoon tea. It is not a perfect science which is why we ask for "extra" names. On the day, the Owen James team will be focused on ensuring these meetings take place



AD HOC NETWORKING

We actually call this speed networking. By lots of cunning manipulation we seat you opposite potential customers and you are given five minutes in which to charm them and exchange cards. Or touch phones ... whatever one does these days. You will hold five ad hoc meetings.

ONE TO ONES

Hand pick who you would like to meet over the coffee breaks.

POST EVENT DRINKS

After all that hard work an opportunity to kick back and have a glass of fizz with all your new friends before trying to find a train.

supporting MATERIAL

SCENE SETTER FINDINGS

The outputs of the research carried out in the run up to the event are available for ongoing reference and perhaps a more measured review by your team.

WHITE PAPERS

The event app provides a platform to include any white papers you wish to push out into the marketplace. They may be relevant to your roundtable subject matter or more general thought leadership generated by your company.

KEYNOTE PRESENTATIONS

Where appropriate, and provided we are given permission, keynote presentations will be made available on the event app by the end of the Meeting.

THE FINDINGS

The outputs from each roundtable will be written up as a two page white paper. The full report is published as The Findings. Featuring your logo, this is published on our website in a searchable format. This content may of course be used by your own company.

keynotes and PROPTECH FUTURES

THE KEYNOTES

At the Meeting, there will be two keynotes. Experience has shown that it is never wise to put in place a keynote too far out from an event. And in these times of tumultuous change, it is even less wise!! The goal is to field speakers who will inform, inspire, challenge and (with a bit of luck) also entertain.

PROPTECH FUTURES

As the industry is undergoing so much technological change, this session will enable you to hear three ten minute presentations on different innovations which it is thought may have a big impact on the industry. They will inevitably be product focused however, they must entertain.



branding AND MARKETING

A key reason to sponsor an Owen James Meeting of Minds is to raise your profile amongst this very senior audience.

BLOGGING

If you would like to convert your roundtable white paper into a blog – we can support.



YOUR BRANDING

Will appear on all event collateral:

EVENT WEBPAGE

LISTING OF PARTICIPANTS

THE APP

EVENT HOLDING SLIDE

POST EVENT FINDINGS

SOCIAL MEDIA

Owen James is keen to build the social media element of your participation.

Over and above the regular tweeting of who is supporting our events, we can tweet the individual white papers produced as part of The Findings.

We seek engagement with your own social media team.

BRAND AWARENESS MONITOR

We will as always ask our audience how aware they are of your brand?

For those of you who have supported past events, we will provide this data in trended format.



schedule OF THE DAY

Belgravia	0845-0930	Breakfast	Informal networking - Over breakfast and coffee
The Ballroom	0930-0950	Keynote	Welcome - Incorporating the highlights of the Scene Setter research. With James Goad, MD, Owen James
The Ballroom	0950-1030	Keynote	The property market of the future? The Government's perspective.
Breakout Rooms	1035-1135	Roundtable Session	<i>Peers strategically discussing their chosen topics, all under Chatham House Rules</i>
Belgravia	1135-1155	Coffee	Grab a refreshment and catch up with your peers
The Ballroom	1155-1225	Networking	Structured networking - An opportunity to meet some new faces
Breakout Rooms	1230-1330	Roundtable Session	<i>Peers strategically discussing their chosen topics, all under Chatham House Rules</i>
The Ballroom	1330-1430	Lunch	A seated formal lunch
The Ballroom	1430-1500	Keynote	How we will live in the future. Eco houses and smart cities from around the world.
Breakout Rooms	1505-1605	Roundtable Session	<i>Peers strategically discussing their chosen topics, all under Chatham House Rules</i>
The Ballroom	1610-1640	Keynote	Panel Discussion: Different generational perspectives. They are your clients, your employees and your children... Or even your parents? How are the different generations reacting to the seismic shifts in society post pandemic? This affects every aspect of your business. You do need to know!
Breakout Rooms	1645-1730	Farewell and Fizz	We thank you for joining us over a glass of bubbly.

MORTGAGE a meeting of MINDS

If you would like to discuss your potential involvement
as a sponsor at Mortgage Meeting of Minds,
please call Nick Waugh on 01483 862693
or email him at nickwaugh@owenjamesgroup.com



Owen James Events Limited Brook House, Mint Street, Godalming, Surrey GU7 1HE

 @OwenJames

 @OwenJamesFS