



CUSTOMER EXPERIENCE MANAGEMENT

FINANCIAL SERVICES HONG KONG

Register before
23 September 2016
to enjoy
savings up to
USD 500!

Co-located with:



DELIVERING TRUE CUSTOMER CENTRICITY IN THE DIGITAL AGE

- **Main Conference:** 29-30 November 2016
- **Post Conference Workshops:** 1 December 2016
- **Venue:** New World Millennium Hong Kong Hotel

2016 KEYNOTE SPEAKERS INCLUDE



Esmond Lee Kin Ying
Senior Advisor
Financial Services
Development Council



David Schillmoeller
Chief Customer Officer
Prudential Corporation Asia



Raju Nair
Regional Head, Customer
Journey Experience,
Consumer Banking Group
DBS Bank



Michael Leung
Chief Information
& Operations Officer
China CITIC Bank International



Fiona Kwok
Chief Propositions Officer,
Zurich Insurance Hong Kong



Richard Chow
Head of Digital Channels Management,
UBS AG



Henk ten Bos
Chief Information Officer
Ageas Insurance Asia



Jonathan Hsu
Director, Head of SHK Direct
& Digital Business,
Sun Hung Kai Financial

WHY INVEST IN CUSTOMER EXPERIENCE MANAGEMENT NOW?



High Customer Expectations – 41% are dissatisfied with the services of Hong Kong's banks & 51% are dissatisfied with insurance companies



Stiff Competition – With new disruptive FinTech competitors in the market, **customer loyalty** is now key



Maximize Revenues – An improvement of 5% in customer retention will drive additional revenues amounting to **HK\$15 billion**



Stringent Financial Regulations – First impression matters. Explore effective strategies aligning **compliance, costs and customer experience**

DON'T MISS OUT ON OUR SPECIALLY-DESIGNED WORKSHOPS!



Leveraging Digital Innovation in Customer Journey Mapping



Turning CX Metrics into Actionable Insights

Turn to p.8 to find out more...

Media Partners:



Researched & Developed by:



MEET THE SPEAKERS



Esmond Lee Kin-Ying
Senior Advisor,
Financial Services Development Council



David Schillmoeller
Chief Customer Officer,
Prudential Corporation Asia



Michael Leung
Chief Information & Operations Officer,
China CITIC Bank International



Raju Nair
Regional Head, Customer Journey Experience, Consumer Banking Group,
DBS Bank



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Chief Propositions Officer,
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Henk ten Bos
Chief Information Officer,
Ageas Insurance Asia



Edouard Zuber
Chief Digital Officer,
AXA China Region



Rémi Segoin
Head of Customer Experience & Innovation,
BRED Banque Populaire



Danny Khursigara
Former Chief Operating Officer, China & Taiwan,
Royal Bank of Scotland



Natalie Raso
Global Head of Client Services, Global Trade & Receivables Finance,
HSBC



Maya Nakhdjavani
Head of Continuous Improvement & Complaints Management, Global Customer Experience,
HSBC



Caroline Frangopoulos
Regional Head of KYC & Client Onboarding,
Societe Generale



Frank Yazdi
Head of Client Services, APAC,
Societe Generale



Eddy Kwong
Vice President, Digital Marketing, Asia Pacific,
Allianz Global Investors



Sriram Srinivasan
Head of Digital Platforms & Channel Operations, Asia Pacific,
HSBC



Chang Tshung-Hui,
Relationship Director, North Asia,
Westpac



Sonia Wedrychowicz
Managing Director, Digital Bank,
DBS Bank



Liza Ding
Managing Director, Head of Marketing & Communications, Asia Pacific,
Deutsche Bank Wealth Management



Jonathan Hsu
Director, Head of SHK Direct & Digital Business,
Sun Hung Kai Financial



Molly Shea
Senior Vice President & General Manager, Digital,
Western Union



Sudesh Thevasenabathy
Head of Customer Experience,
AXA Hong Kong



Geraldine Leung
Director, Customer Experience,
Manulife Asia



Priscilla Ng
Head of Customer Franchise,
Citibank



Ram Kumar
Senior Vice President, Head of Data & Analytics,
QBE Insurance



K.F. Lam
Executive Director, Head of Compliance,
United Overseas Bank Hong Kong



Liam Gilligan
Head of Innovation Lab,
Commonwealth Bank



Alex Zhang
Director, R&D,
Shanghai Oriental Financial



Richard Chow
Head of Digital Channels Management,
UBS AG



Philippe Dirckx
Managing Director, Head of Markets & Initiatives, Asia Pacific,
SWIFT



Scott Polchleb
Head of UX & Design, APAC,
Visa



Jonathan Wan
Deputy Head of Personal Banking,
Industrial and Commercial Bank of China (Asia)

8:20 Registration & Morning Refreshments

9:00 Opening Remarks from the Chairperson

Danny Khursigara

Former Chief Operating Officer, China & Taiwan,
Royal Bank of Scotland

HONG KONG'S FINANCIAL SERVICES INDUSTRY OUTLOOK

9:10 Driving Growth in Hong Kong's Financial Landscape

- Overview of Hong Kong's current financial market
- How can the financial services industry work together to maintain Hong Kong's competitive edge as a leading global financial hub?
- Evaluating key strategies to stay competitive and relevant in the digital age

Esmond Lee

Senior Advisor,
Financial Services Development Council

9:50 Embracing Digital Disruption in Financial Services

- Digital disruption & the rise of Fintech: Identifying emerging threats and opportunities
- How can organisations drive sustainable growth and the eventual evolution towards a digital enterprise?
- Building organisational agility to keep pace with changing regulatory requirements and an evolving business environment

Edouard Zuber

Chief Digital Officer,
AXA China Region

David Schillmoeller

Chief Customer Officer,
Prudential Corporation Asia

Sonia Wedrychowicz

Managing Director,
Digital Bank,
DBS Bank

Liam Gilligan

Head of Innovation Lab,
Commonwealth Bank

Philippe Dirckx

Managing Director, Head of Markets & Initiatives,
Asia Pacific,
SWIFT

10:30 Refreshments & Networking Break

CUSTOMER EXPERIENCE EXCELLENCE ROADMAP

11:00 Leading Organisational Transformation Towards Greater Customer-Centricity

- Customer experience as a competitive edge: How can organisations drive quality, transformative customer experience?
- Leveraging customer experience design, technology and data science in your customer journey mapping
- Overview of Prudential's customer experience initiatives, key strategies and outcomes

David Schillmoeller

Chief Customer Officer,
Prudential Corporation Asia

11:40 Embedding Yourself in the Customer Journey Roadmap – The DBS Perspective

- Transitioning into a customer-centric organisation: Revisiting key strategies and challenges
- Moving away from product innovation to customer-centricity: How do you go beyond the functional needs of your customers?
- Adopting human-centred design principles to deliver exceptional customer experience

Raju Nair

Regional Head, Customer Journey Experience,
Consumer Banking Group
DBS Bank

12:20 Networking Lunch

REGULATORY COMPLIANCE & CUSTOMER EXPERIENCE

13:20 Complying with AMLO: Know-Your-Customers (KYC) without Compromising on Customer Experience

- Reviewing the KYC and account opening process: Where are the major areas of conflicts impacting good customer experience?
- Streamlining and refining the KYC process of acquiring data from customers
- Interaction with customers: How can banks educate customers on the importance of AMLO compliance and get buy-in?

Caroline Frangopoulos

Regional Head of KYC & Client Onboarding,
Societe Generale

Frank Yazdi

Head of Client Services, APAC,
Societe Generale

14:00 Striking a Balance between Great Customer Experience & Financial Compliance

- Investigating the impact of financial regulations on customer experience
- Exploring effective collaboration with regulators on complying and delivering world-class customer experience
- Customer data acquisition: Discussing the possibility of a central repository system to enable cross transfer of customer data for financial transactions
- Aligning people, process and technology for the best results

Michael Leung

Chief Information & Operations Officer,
China CITIC Bank International

K.F. Lam

Executive Director,
Head of Compliance,
United Overseas Bank Hong Kong

Danny Khursigara

Former Chief Operating Officer, China & Taiwan,
Royal Bank of Scotland

Jonathan Wan

Deputy Head of Personal Banking,
Industrial and Commercial Bank of China (Asia)

KEYNOTE PRESENTATION

KEYNOTE PANEL DISCUSSION

PANEL DISCUSSION

DIGITISATION & USER EXPERIENCE

14:40

PANEL DISCUSSION

Embracing Digital Trends & Technologies to Drive Exceptional Customer Experience

- Staying relevant – Understanding the preferences, expectations and consumption patterns of your modern customers
- The latest digital trends and technologies – Making the distinction between must-haves and good-to-haves
- Enabling the seamless integration of digital technologies with traditional legacy systems
- Enhancing data security in the digital era

Henk ten Bos
Chief Information Officer,
Ageas Insurance Asia

Sriram Srinivasan
Head of Digital Platforms
& Channel Operations,
Asia Pacific,
HSBC

Liam Gilligan
Head of Innovation Lab,
Commonwealth Bank

15:20

Refreshments & Networking Break



15:50

Harnessing User Experience Design to Optimise Digital Interactions with Customers

- Redefining customer experience with design-thinking
- Aligning online interactions with customer expectations
- Creating digital experiences through interactive apps and mobile strategies
- Establishing a user experience model built upon continuous improvement

Scott Polchleb
Head of UX & Design, APAC,
Visa

16:30

CX Leaders Interactive Roundtable

During this part of the summit, delegates will get the opportunity to choose a topic of discussion for 45 minutes. Discussion groups are deliberately kept small to ensure all

delegates get the opportunity to ask their most pressing questions, thereby guaranteeing an interactive and tailored experience.

Table 1: Digitising Contact Centres

Moderator:

Maya Nakhdjavani
Head of Continuous Improvement & Complaints Management, Global Customer Experience,
HSBC

Table 2: Standardising Service Delivery Excellence with 3rd Party Agents

Moderator:

Sudesh Thevasenabathy
Head of Customer Experience,
AXA Hong Kong

Table 3: Engaging Your Customers via Targeted & Personalised Content Marketing

Moderator:

Jonathan Hsu
Director, Head of SHK Direct & Digital Business,
Sun Hung Kai Financial

Table 4: Measuring & Capturing Customer Satisfaction

Moderator:

Rémi Segoin
Head of Customer Experience & Innovation,
BRED Banque Populaire

17:15

Closing remarks

17:30

Close of Conference Day 1

RAVE REVIEWS FROM OUR CEM EVENT SERIES

Excellent event bringing together practitioners from various countries and on different aspects of customer experience building - right from management strategies, technology support systems, HR practices, big data usage, etc. Holistic exposure to all aspects.

Alok Kumar
Chief Service Delivery Officer,
Aircel Ltd

8:20 **Registration & Morning Refreshments**

9:00 **Opening Remarks from the Chairperson**

Rémi Segoin

Head of Customer Experience & Innovation,
BRED Banque Populaire

CAPTURING & MEASURING CUSTOMER EXPERIENCE

9:10 **Effectively Capturing the Voice of Your Customers: The Zurich Transactional Net Promoter Score (T-NPS) Case Study**

- Getting closer to your customers: Measuring the level of customer advocacy at key touch points
- How does Zurich T-NPS compare with traditional VoC in the delivery of customer experience?
- Digital voice of the customer: Collecting customer feedback on digital platforms
- Improving T-NPS Score by 80% in one year : Actionable insights from Zurich's VoC strategy

Fiona Kwok

Chief Propositions Officer,
Zurich Insurance Hong Kong

9:50 **Measuring & Quantifying Customer Experience in Financial Services**

- Challenging the effectiveness of available metrics such as NPS, CSAT & CES in measuring customer experience
- Exploring new alternatives of measuring the performance of customer experience
- Developing a standard method of quantifying customer experience across financial services in Hong Kong
- How do you translate customer experience results into actions?

Alex Zhang

Director, R&D,
Shanghai Oriental Financial

Geraldine Leung

Director, Customer Experience,
Manulife Asia

Priscilla Ng

Head of Customer Franchise,
Citibank

10:30 **Refreshments & Networking Break**

CHANNEL STRATEGY

11:00 **Delivering an Outstanding Branch Network Experience**

- Catering to the needs of Hong Kong's modern customers: What constitutes as an excellent branch experience?
- Digitising & automating branch operations to delight customers: Finding the sweet spot between digital and in-person interaction
- Devising a complementary branch network and digital customer experience strategy

Chang Tshung-Hui

Relationship Director, North Asia,
Westpac

11:40 **Building an Integrated Omni-Channel Experience**

- Addressing the challenges of delivering service consistency across channels
- Leveraging technology to develop a 'single view' of your customers across multiple platforms
- How can you build a true omni-channel experience, deliver and measure it?

Molly Shea,

Senior Vice President & General Manager, Digital,
Western Union

12:20 **Networking Lunch**

13:20 **Identifying the Right Platforms & Services for Different Customer Segments**

- Evaluating the effectiveness of your channel strategy in meeting different customer needs
- Traditional vs. digital platform: To what degree should investments be focused on digital platforms as the key transactional medium in Hong Kong
- Developing the best strategy to support various consumer groups: Elderly vs. digital natives, high net-worth vs mass market

Richard Chow

Head of Digital Channels Management,
UBS AG

Jonathan Hsu

Director, Head of SHK Direct & Digital Business,
Sun Hung Kai Financial

Liza Ding

Managing Director, Head of Marketing & Communications, Asia Pacific,
Deutsche Bank Wealth Management

Natalie Raso

Global Head of Client Services, Global Trade & Receivables Finance,
HSBC

Chang Tshung-Hui

Relationship Director, North Asia,
Westpac

DATA ANALYTICS & CUSTOMER INSIGHTS

14:00 **Implementing a Data-Driven Strategy Transforming Customer Experience**

- Data correctness and quality: How can you ensure that customer data are captured in the right manner?
- Going beyond big data analysis: Obtaining actionable insights to improve customer experience
- Monetizing opportunities from big data: Identifying the gaps in services and offerings

Ram Kumar

Senior Vice President, Head of Data & Analytics,
QBE Insurance

14:40 **Refreshments & Networking Break**

15:10 **Analysing Consumer Behaviour to Drive Personalised Customer-Centric Experience**

- Assessing customer's expectations of a personalised digital experience
- Effective strategies and tools for analysing customer behaviour on digital platforms

PANEL DISCUSSION

PANEL DISCUSSION

- Translating analysed data into customisable, personalised actions for the individual customer
- Exploring the role of predictive analytics in identifying the future needs of customers

Eddy Kwong

Vice President, Digital Marketing, Asia Pacific,
Allianz Global Investors

EMPLOYEE ENGAGEMENT & CHANGE MANAGEMENT

15:50 **Empowering Employees to Deliver Top-Notch Customer Experience**

- Advocating for a customer-centric mindset within the institution: Educating C-suite, senior management and executives across the various business and support lines via top-down approach
- Providing personalised services and achieving problem resolution: Training 3rd party agents, contact and service centres via bottom-up approach
- Implementing a global standard framing employees' dealing with customers, encouraging the organisation to look 'outside-in'

- Leveraging on attractive incentives to change the behaviour of employees towards greater customer-centricity

Sudesh Thevasenabathy,

Head of Customer Experience,
AXA Hong Kong

16:30 **Transforming into a Process-Driven, Service-Based Model**

- Looking through the customer lens: Where are the gaps in traditional product-based business model?
- Key steps to implementing a service-based business model: How can we streamline processes to improve efficiency and customer experience?
- Improving inter-departmental connectivity and automating operational processes to deliver ease and efficiency

Maya Nakhdjavani

Head of Continuous Improvement & Complaints Management, Global Customer Experience,
HSBC

17:10 **Closing remarks**

17:20 **Close of Conference Day 2**

INSIGHTS FROM OUR 2016 CEM FINANCIAL SERVICES BENCHMARKING REPORT

What factors are driving your company to improve your CEM?



What topic / solution are you most interested in learning more about at the event?



Source: Insider Insights: CEM in Financial Services Benchmarking Report

[READ FULL REPORT HERE](#)