

Sponsored by
CHARLES
STANLEY *Direct*

Deloitte. **EValue**

Media Partners
THE TIMES
THE SUNDAY TIMES



08:15 - 08:45 Registration

Section One: Are our customers a community we lead or which leads us?

08:45 - 09:20 **Introduction & Welcome** **Holly Mackay, CEO of Boring Money**
Holly will talk us through the insights Boring Money have gathered in 2019. Who are the consumers using, current trends, the Advice Gap, ESG, investing confidence, and the gender divide. Plus what we see coming for 2020.

09:20 - 10:00 **Keynote Speaker** **Nathalie Nahai, Author of Webs Of Influence; Researcher**
Nathalie examines the ethics of data sharing, the trust deficit, & resistance to online manipulation. Nathalie advises companies on reaching audiences using persuasive tech and branding while maintaining an ethical framework. What can we learn from digital consumption patterns and personality traits?

10:00 - 10:30 **Panel Discussion: How to create a community**
What makes a community-led business model successful?
Richard Cook, Online Community Manager at Monzo Bank
Jane Brady, Head of Client Solutions at Mumsnet
Viktor Nebehaj, CMO of Freetrade

10:30 - 11:00 **Fireside Chat** **Ross Dalzell, Head of Digital Investment Platforms at Barclays**
Ross will discuss how to approach personalisation when you have so many customers, with so many needs. And as a bank - what is your responsibility?

11:00 - 11:20 Coffee Break

Section Two: Where is the influence?

11:20 - 11:50 **The Digital Economy**
Chris Mullan, Head of Artificial Intelligence at Deloitte
Mason Edwards, Retail Banking Lead at Google
Chris and Mason will explore the way the life and pensions industry could influence people through the digital economy. What are the challenges around availability of data? How can we build something practical rather than 'cool'?

11:50 - 12:30 **The Nine Faces of Influencer Marketing**
Oliver Lewis, Managing Director of The Fifth
Jess Markwood, Content & Strategy Director of The Fifth
Carmel Dickinson of Boring Money will chat with Jess and Oliver about how strong influencer marketing currently is as an advertising model. Plus, using a Boring Money brief, they'll demonstrate how influencer campaigns work.

12:30 - 12:50 **Language Influences Everything** **Sven Hughes, Founder of Verbalisation**
Strategic communications consultancy Verbalisation harnesses psychological & behavioural audience insights to help clients relate to customers better.





12:50 - 13:50

Lunch Break

Section Three: Shall we get personal?

13:50 - 14:20

Customers are a Reflection of your Internal Culture

Andrew McMillan, Founder of **Engaging Service**
& Former Head of Customer Service at **John Lewis**

At John Lewis, Andrew oversaw the introduction of ratings & reviews, making customer feedback collective rather than individual. How do firms operate public arenas & make customer service a key differentiator in product-led environments? What's the connection between happy staff & happy customers?

14:20 - 14:45

It's About The Journey **Caroline Hughes, Co-Founder of Lifetise**

New fintech Lifetise create a world of 'Sliding Doors', helping consumers contextualise financial outcomes through their life plans. Caroline will demo how consumers can adjust their choices to see how much they need to achieve goals.

14:45 - 15:15

Make It Feel Like Magic **Tim Jablonski, Product Director at EValue**

Tim will use concepts from personalised video and goal planning, to explain complex investment pathways in a way which makes it feel like magic.

15:15 - 15:45

Coffee Break



Section Four: Who is responsible?

15:45 - 15:55

Insights: Consumer & Adviser Views on ESG **Boring Money Insights Team**

Jim Adams and Phil Wickenden will share the latest Boring Money research on the consumer view and the adviser view on ESG products.

15:55 - 16:20

Panel Discussion: The Beautiful Story of Ethical & Social Impact Investing

The panel will discuss where they feel the growing interest in ESG should be taken, and how as businesses they in particular are approaching it. And who should drive the growth of ESG propositions and products - the industry or the consumers?

John Porteous, Group Head of Distribution at Charles Stanley Direct
Amy Metcalfe, Head of Programmes and Finance at ShareAction
Cameron Bourne, Head of Partnerships at The Big Exchange

16:20 - 16:50

Trust, Power and PR in Financial Markets

Dr Clea Bourne, Senior Lecturer at Goldsmiths, University of London

Clea's main research interest is in financial markets and how they mediate in global and local discourses. Her latest study identified that 66% of consumers say it's important for brands to take public stands on social & political issues. Meanwhile finance fixates on 'trust' without gaining it.

16:50 - 17:00

Final thoughts **Holly Mackay, CEO of Boring Money**

Holly will tie together a summary of the day, highlighting some of the most striking learnings to take away as a challenge - plus the top 5 trends for 2020!



17:00 - 19:00

Drinks and networking

Email carmel@boringmoney.co.uk or head to www.boringmoneybusiness.co.uk/events/2019-annual-conference to book.

Tickets - **£595 +VAT** or **£295 +VAT** for advisers and start-ups