Branch Transformation

#BT18 | London 27th-28th November 2018

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DAY ONE – 27th NOVEMBER 2018

5:00 Registration, refreshments and exhibits open

9:00 Welcome and opening remarks

9:10 Keynotes

Human digital banking
For years, Umpqua Bank has pioneered a customer-centric approach to banking. Today, as technology is leading to increasingly empowered, transactional interactions, Umpqua has introduced Hyper-personalized banking. In this session, Andrew Goeden, Umpqua Bank’s Chief Innovation and Digital Officer, will showcase how text-based chat, computer vision and voice recognition are enhancing the customer experience.
Charles O’Hare, President and CEO, Umpqua Bank (USA)

Making the branch a success
How do we measure the success of digital technologies in a digital world? We will delve into our transforming branch network, making our branches destinations, empowering our employees to provide the absolute best experience and always maintaining our customer obsession.
Sol Green, Chief Administrative Officer, JP Morgan Chase (USA)

Giving power to the people
Empowered staff can be a transformative force within a bank’s branch network. Hear how this major international bank has reimagined and redesigned branch banking through a people proposition that has built leadership among senior digital and delivery leadership and a workforce with a shared understanding of their purpose.
Richard Hartmann, Head of UK Network and Premier, HSBC (UK) and Sally Williams, Head of Performance and Growth, HSBC (UK)

10:45 Coffee and exhibits open

11:30 Keynotes

Transcending channels to create the branch of the future
As the boundaries between channels become increasingly blurred, banks will need to find that holy grail about the way their consumers interact with them in order to live up to current expectations. The concept of the branch has to change, as it plays a significant role in bridging the gap between physical and digital, online and offline.
Senior executive from leading industry supplier

Branch transformation for many generations
Can branch transformation anticipate a new generation of customers while meeting the requirements of existing core customers? This presentation shares a journey from one-size-fits-all branch transformation to a new understanding of the connection between business design and multidimensional customer demands for a modern customer-centric environment.
Simon Griffiths, EVP Head of Retail Distribution, Citrus Bank (USA)

Enhancing the branch: harmonising physical with digital
Analyse the gap between digital reality and the perception of delivering an exceptional customer experience, leading to new engagements. Learn how a major UK bank leverages a robust digital infrastructure to deliver an engaging branch transformation journey to harmonise its physical and digital channels.
Jimmy Robertson, Head of Branch Strategic Projects, RBS Group (UK)

12:45 Lunch and exhibits open

14:00 Stream 1: Bridging the gap between physical and digital

Accelerating digital branch transformation
The ultimate branch experience is the combination of digital technologies with a human touch to deliver personalised and relevant physical and digital experiences. Attend this seminar to hear about the bank’s purpose, the needs of its clients, its aspirations and the preliminary steps of its transformation journey.
Philippine Rocx, Director, Branches, ING (Netherlands)

Should digital players invest in physical distribution?
In the digital age, the branch remains crucial for winning consumer trust, and also for engaging and acquiring customers. Join this session to understand how data analytics can put the right branch at exactly where they should be.
Slawomir Kozioł, Head of Branch Transformation, mBank (Poland) and Piotr Sobczewski, Branch Transformation Strategist, mBank (Poland)

The physical robust – who says the branch elephant can’t dance?
In the era of e-commerce, how do banks turn to the physical to deliver an exceptional customer experience, leading to new engagements? Learn how a major UK bank leverages a robust digital infrastructure to deliver an engaging branch transformation journey to harmonise its physical and digital channels.
Givanildo da Luz, CEO, Saque e Pague (Brazil)

Closing keynotes

What are the benefits of cash recycling and what are the conditions needed to make it a success?
Stream 1: Best practices for cash management

Closing remarks

Closing day remarks and drinks reception

DAY TWO – 28th NOVEMBER 2018

8:45 Registration, refreshments and exhibits open

9:00 Stream 1: Best practices for cash management

Stream 2: Using data analysis to power branches

Rewiring branch management to deliver branch transformation
As branches transform into customer-facing, data-driven experiences, we need to create more efficient and effective processes. Innovation at UMB (United Bank Kentucky) and Lloyds Banking Group is key to achieving this objective.
Cort O’Haver, President and CEO, Umpqua Bank (USA)

Lucy Boddy, Chief Digital Officer, Lloyds Banking Group (UK)

Transforming branch processes through behaviour analytics
This major Italian bank has taken an extensive work to optimise branch processes. Starting from detailed modelling of IT colleagues, on-working, customer satisfaction and process activities to branch-monitoring of activities, and also through using a dedicated ad in-branch behaviour monitoring, the bank launched a number of agile work streams.
Gianluigi Pesce, Head of Group Organisational Development and Governance, UniCredit (Italy) and Tiziano Lui, Head of Organisational Development, Italy, UniCredit (Italy)

How deep data analysis can generate new revenue streams
Branches are not just for customers. They can generate huge sales opportunities, for both new and existing customers. Analysis of data allows banks to personalise the offers they make, leading to higher returns and lower costs. In this case study a large French bank shares the power of data analysis in understanding customer preferences and predicting markets.
Savannah Open

12:45 Lunch and exhibits open

14:00 Closing keynotes

Omnichannel banking: the strategic role of ABMs
Stream 2: Enhanced customer engagement

How does it make the branch relevant?
A cultural shift is taking place, and unless banks stop viewing their branches as transaction centres and start delivering what their clients want, we are on a collision course for the future of the retail bank branch under a cloud. How is the branch of the futuremodel working?
Paul Tetlow, Head of Networks, CBICG (UK)

The branch of the future doesn’t actually exist – a South African perspective
The largest African bank in the world has been on a branch transformation journey since 2010. Attending this seminar will understand why, the nature of the problem (and what needs to be done) and the innovative digital strategy that the bank has adopted.
Niraj Patel, Head of Corporate Real Estate Services, Standard Bank (South Africa)

Biometric identification – branch use cases and outcomes
Banks are constantly trying to reduce their costs and comply with the KCC regulations, particularly when it comes to customer onboarding. This bank has chosen to implement biometric processes within branch, including passport verification and age identification, using a combination of biometric identification and other digital technologies.

Closing remarks

For the latest version of the speaker programme and to register online, please visit: www.rbrlondon.com/bt
Delegate fees and registration

- Retail bank employee: £800
- Reduced rate for sponsor employee: £900
- Standard rate for non-sponsor delegate: £2,000

Registration includes access to the full conference, the exhibition hall, all food and beverages served during the two-day event, including the drinks reception at the end of day one, and copies of conference presentations after the event.

For information on special offers and to register online, please visit www.rbrlondon.com/bt

Sponsorship packages

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- Double booth (incl. 4 delegate passes): £16,000
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Retail bank employee: £800
Reduced rate for sponsor employee: £900
Standard rate for non-sponsor delegate: £2,000

Please contact Amanda Hardy at amanda.hardy@rbrlondon.com or call +44 1284 702575 to receive a sponsor prospectus or to discuss your requirements.

Hotel

Royal Lancaster Hotel
Lancaster Terrace, London W2 2TY, UK

A limited allocation of rooms has been negotiated at preferential rates of £205 (+VAT) incl. continental breakfast for Monday 26th and Tuesday 27th November. Please make your reservation via the following link: https://book.passkey.com/e/49612221

Attendee demographics

- Strong bank attendance
- Solid international representation
- Europe 34%
- UK 51%
- World 15%
- Press/analysts 19%
- Suppliers 18%

Conference organiser

Branch Transformation 2018 is organised by RBR. RBR is a leading research and consulting firm specialised in the areas of banking and retail automation, cards and payments. Based in London, RBR serves clients across more than 100 countries through premium research reports, consulting, newsletters (Banking Automation Bulletin) and conferences. For more information about all of RBR’s conferences, please visit www.rbrlondon.com/events