

The Platform Digital Seminar: Digital Disruption

17th November 2011

Logica, Kings Place, 90 York Way, London, N1 9AG

Supported By:



EVENT OVERVIEW: YOU KNOW WE'RE ALL DIGITAL COMPANIES NOW!

38 million customers are registered for online banking in the UK, one in five people have used some form of mobile banking and 69% of internet users have bought at least one financial services product online.¹ Meanwhile, retail investment has been buffeted by the digital revolution without necessarily embracing it. Increasingly, the consumer expects to research and manage investments online and our sector doesn't always meet their expectation.

The Platform offers a step-program to redemption!

- Step 1: Recognise that there's a problem – we're all digital companies now!
- Step 2: Learn from other sectors about how to 'kick the analogue habit' and thrive in the digital world.
- Step 3: 'Addicted' to Google? Understand the nuts and bolts of digital marketing – know your PPC from your SEO and CPA!
- Step 4: Recognise a 'higher power' can give you strength: social media, mobile, video – how should we be thinking about the emerging digital opportunities?
- Step 5: Distil all of the above into a platform and retail financial services context, and learn to 'love your new life' in this digital age.

SETTING THE SCENE – HOW THE INTERNET HAS DISRUPTED OUR SECTOR – WHAT CAN WE LEARN FROM THOSE WHO ARE ADAPTING BEST?

0830-0900 Registration and coffee

0900-0915 Chair's Introduction – Holly Mackay, MD, The Platform

- Welcome and introductions
- The Platform landscape – Adviser and D2C (direct to consumer) platforms – It's all about retail distribution
- The consumer's interaction with platforms

0915-0945 We're All Digital Companies Now – Jeremy Fawcett, Head of Digital, The Platform

- Where we are with digital – The evolution of the digital landscape and how finance brands are engaging with it
- What does the consumer expect in the digital world and which brands are doing well?
- Coping strategies – Scared of digital and feeling behind the game? – A framework for how to think about digital and get ahead of your competitors

¹ Mintel: Technology and the Internet in Financial Services, August 2010

THE PLATFORM

ENGAGING WITH CONSUMERS IN THE NEW DIGITAL LANDSCAPE

0945-1015 Social Media – Antony Mayfield, BrilliantNoise

- It's a brave new 'social' world... but many of the principles are still the same. Social media as part of a multi-channel communications approach.

COFFEE BREAK 1030 - 1115

1115-1145 Mobile and Money – Simon Andrews, Founder, Addictive

- Why is mobile is so important to financial services, how is innovation changing the consumer and what are the key trends. What can we learn from the best m-commerce examples?

1145-1215 Online Security Considerations – Andrew Lloyd, Director, Insurance and Wealth Management, Logica

- £164 billion of swag sitting on IFA platforms might look tempting to the cyber criminals. How do we keep the robbers at bay without deterring new customers?

WHERE NOW FOR RETAIL DISTRIBUTION?

1215-1230 Platforms and Digital – Holly Mackay and Jeremy Fawcett, The Platform

- A look around digital adoption in our sector
- Thoughts about emerging best practise
- How to advise consumers without giving "advice" – thoughts on regulations
- Concluding remarks

WHO SHOULD ATTEND?

This is an event for senior decision makers involved in the retail distribution of investment products. As companies in our sector focus more on the digital consumer, this seminar will provide insight into the key issues at play and guidance on how to take businesses forward. The content will be of most use to business leaders and marketing heads across fund management, life and pensions, stockbroking, retail banking and platforms in both advised and direct channels.

HOW TO REGISTER

The cost of the event is £250 + VAT per delegate. If you would like to send delegates to the event, please return the event booking form, available on our website.

For further information please contact Chloe King (020 7970 6640, chloe@theplatform.com):