

The Canadian Institute's *Cutting-Edge*

Marketing for Financial Services

Proven Strategies to Compete and Win in this Hypercompetitive Sector

November 29–30, 2012 ▶ One King West Hotel, Toronto

Eye opening not to be missed keynotes from:



Paul Crowe, **BNOTIONS**

How Customer Behaviour and Emerging Technologies Will Impact Financial Services Marketing



Alfred DuPuy, **Interbrand**

What it Takes to be a Leading Brand in a Competitive Market

What You Will Take Away From this Event:

- ▶ Strategies to **captivate and engage** when you are a **low-engagement brand**
- ▶ What every financial services marketer needs to know about **mobile users and their expectations of you**
- ▶ How to **use social media to drive sales**
- ▶ How to **drive profitability through continuous customer communication** using a seamless multi-channel marketing campaign
- ▶ The latest strategies for **harnessing the power of segmentation and predictive modeling**

+ Critical Insight from:

BMO Financial Group
CIBC
Dundee Wealth
Google Canada
Macquarie Private Wealth
Mastercard Worldwide
Scotiabank
Servus Credit Union
Sun Life Financial
Zions Bank Interactive Services

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WHO WILL BE THERE:

Co-Chairs

Kelly Harper
Director Customer Experience Learning
BMO Institute for Learning

Dan Skeen
AVP Digital Channels
Sun Life Financial Canada

Speakers

Matthew Brown
Manager Digital Experience
Servus Credit Union

Derek Colfer
Global Mobile Product Innovation, **Visa Inc.**

Paul Crowe
Partner & CEO, **BNOTIONS**

Jimmy Dinh
Senior Director Mobile Banking Strategy
& Planning, **CIBC**

Nicolas Dinh
Director/Product Leader Emerging Payments
Mastercard Worldwide

Mike Dumbroski
Vice President of Client Services
Communispace

Alfred DuPuy
Managing Director, **Interbrand**

Ned Elton
Managing Partner – Financial Services
Rosetta Interactive

Ackley Gaskin
Senior Digital Marketing Manager
BMO Financial Group

Tal Harry
Partner, **Richter7**

Mark Healy
Partner, **Satov Consulting**

James Marous
Senior Director
Harland Clarke Marketing Services

Silu Modi
Vice-President Digital Marketing
Macquarie Private Wealth

Paul Regan
Director Media Innovation and Strategy
Scotiabank

Dave Resnick
Head of Industry – Financial Services
Google Canada

Christine Saunders
Vice-President Interactive Marketing
H2 Central

Fazal Siddiqi
Founder, **OPAL Marketing Group**

Matt Wilcox
Senior Vice-President
Zions Bank Interactive Services

Ryan Wilson
Director eMarketing, **Dundee Wealth**

Cutting-Edge Marketing – Specifically Designed for Financial Services!

Financial services is one of the oldest and most prestigious industries – yet it is not immune to the astronomical changes taking place in customer behavior and needs, the limited avenues for growth, rapidly emerging technologies and mobile-friendly landscape.

You need to raise your game to stand out in today's marketplace.

Join us on November 29–30, 2012 in Toronto at **The Canadian Institute's Cutting-Edge Marketing for Financial Services** conference and explore how clients want to interact with financial services providers today and how you can develop effective strategies that meet customer needs and your business objectives.

Caution and lack of understanding should not be holding you back. You need to know:

- ▶ How dramatic shifts in customer behavior and emerging technologies will affect your marketing practices
- ▶ How a low-engagement brand can actually thrive online and reap the rewards
- ▶ How mobile customers interact with financial services and what they expect from you
- ▶ What it takes to be a valuable brand in today's marketplace and in the coming years
- ▶ How to turn social media efforts into actual sales
- ▶ The latest trends in segmentation and predictive modeling

And much more!

PLUS! Hone your skills with the interactive and in-depth post-forum Strategy Session: **Revolutionary Strategies for Increasing ROI by Creating the Ultimate Customer Onboarding and Brand Experience**. Hear directly from the award-winning team that created the Rapid Deployment Intelligent Onboarding Program for Zions National Bank, which generated a return on its investment of more than six to one; an average retention rate of 96 percent; and an increase in deposits of 40 percent!

In addition, start your learning experience with the hands-on and extremely practical pre-forum Master Class: **The 7 Steps to Operating and Benefitting from an Integrated Marketing Campaign**. You will walk away from this class with a toolkit and immediately implementable knowledge!

Register today by calling **The Canadian Institute** at **1-877-927-7936**, by faxing your registration to **1-877-927-1563** or by registering online at **www.CanadianInstitute.com/MarketingFS**.

We look forward to seeing you at the event in November!

WHO SHOULD ATTEND

EVPs, VPs, Directors and Managers of the following functions:

- ✓ Marketing
- ✓ Online/Web/eChannel/Internet Marketing
- ✓ Interactive Marketing
- ✓ Mobile Channel
- ✓ Brand Strategy and Marketing
- ✓ Media Marketing
- ✓ Digital Channels and Strategy
- ✓ Customer Experience
- ✓ Marketing Communications
- ✓ Segmentation and Predictive Modeling

Register at 1-877-927-7936 (416-927-7936) or www.CanadianInstitute.com/MarketingFS

PRE-FORUM MASTER CLASS

Wednesday, November 28, 2012

1:00 to 4:00 p.m. (Registration opens at 12:30 p.m.)

A The 7 Steps to Operating and Benefitting from an Integrated Marketing Campaign

Master Class Leader:

Christine Saunders

Vice-President Interactive Marketing
H2 Central

Integrated marketing campaigns combine new and traditional media marketing tools and strategies to connect consumers across multiples platforms. The goal is to integrate brand awareness across channels, which will result in engaged customers and increased revenue.

Attend this interactive and hands-on session to learn about all of the key elements that drive the success of integrated marketing campaigns and the know-how to develop, implement and benefit from them.

- The value of online and offline marketing channels
- Client insight & feedback – setting objectives & measures
- Strategies for set up and planning your campaign
- Handling issues of speed and response time in a 24/7 world
- Setting a practical social media policy
- Privacy, compliance and HR
- Working with suppliers and keeping it together

DAY 1 ▶ Thursday, November 29, 2012

8:00 Registration Opens and Coffee Served

9:00 Opening Announcements from the Co-Chairs

Kelly Harper

Director Customer Experience Learning
BMO Institute for Learning

Dan Skeen

AVP Digital Channels
Sun Life Financial Canada

9:15 Consumer Revolutions are Transforming Everything: How Customer Behaviour and Technology Will Impact Financial Services Marketing

Paul Crowe

Partner & CEO
BNOTIONS

No industry is immune from the revolution occurring.

There have been dramatic shifts taking place in customer behaviour and there has been a failure of venerable organizations to recognize and respond to those shifts. In today's marketing environment, brands need to invest in creating experiences that place the customer at the centre, not themselves, and developing technology that will allow them to be agile and nimble in their communications. Marketing departments need to understand that their job is becoming more and more about

product development than communicating messages and that the organization that can move and react that fastest will win.

Paul Crowe will challenge the top down model of the typical financial service experience and examine the technologies and opportunities that are likely to have the most significant impact on financial services and consumers over the next decade.

10:15 Networking Coffee Break

10:30 How a Low-Engagement Brand Can Captivate Consumers, Thrive Online and Reap the Rewards

Attend this eye-opening session and hear how you can create highly engaged communities that yield actionable insight even in the highly-regulated financial services space.

Panelists:

Matthew Brown

Manager Digital Experience
Servus Credit Union

Mike Dumbroski

Vice President of Client Services
Communispace

Ackley Gaskin

Senior Digital Marketing Manager
BMO Financial Group

Silu Modi

Vice-President Digital Marketing
Macquarie Private Wealth

Ryan Wilson

Director eMarketing
Dundee Wealth

- How should your marketing strategy change now that recommendations are growing more important than ever?
- How can financial services breed “fans” and influencers?
- How can you increase interaction with your customers?
- How to get customers to share their experiences online
- Key activities you can utilize to engage with your customers online
 - Strategies for entertaining versus just informing
 - Incentives to participate and share
 - Exclusive offers
- What are the appropriate uses of social media for financial services?
- How to train and develop “community managers”
- How to deal with “letting go” once you lose control of your message
- Important compliance issues not to be overlooked

11:30 The Next Frontier – Mobile Apps, Wallets, Payments and QR Codes: What Every Financial Services Marketer Needs to Know About Mobile Strategies and Consumers

Ned Elton

Managing Partner – Financial Services
Rosetta Interactive

Jimmy Dinh

Senior Director Mobile Banking Strategy & Planning
CIBC

Interactive Roundtable

Opening Keynote Address

Nicolas Dinh

Director/Product Leader Emerging Payments
Mastercard Worldwide

Derek Colfer

Global Mobile Product Innovation
Visa Inc.

The battle for the mobile space has obviously begun, but is your marketing department ready?

Investments in mobile capabilities will come from success in mobile marketing efforts, so grab this unique opportunity to engage in an interactive discussion with experts and walk away with the knowledge required to capture your share of wallet in this emerging channel.

- What you need to know about mobile consumers
 - Key differences every marketer needs to know about mobile versus non-mobile customers
- The potential penetration of these new technologies
 - How will the shift to mobile affect the Gen Y, Gen X, Baby Boomers and other demographics?
 - How will this shift affect the competitive landscape and how should you respond
- Critical information about how consumers' behaviors change after they adopt mobile and financial services apps
- It is essential to give customers what they want – an in-depth look at what mobile users want from their financial services
- Innovation is driving the market – how can financial services stay on top and what is marketing's role in this rapidly changing landscape?
- How can financial services ensure that their brand lives and is differentiated online?
 - How will consumers recognize the different credit cards or payment cards in a virtual world?
 - How can financial services strategically use mobile to increase their brand awareness?

12:30 Networking Luncheon for Delegates and Speakers

1:45 Innovative Financial Services Campaigns and Social Media Efforts that Drive Sales

Paul Regan

Director Media Innovation and Strategy
Scotiabank

Attend this session, get inspired and learn how other organizations are benefitting from innovative marketing campaigns and engagement through their social media efforts. Paul Regan will discuss how Scotiabank is helping lead the industry with innovative programs on Facebook and other social platforms – as well as share hidden trends and groundbreaking marketing achievements used by major financial firms around the world!

2:45 Networking Coffee Break

3:00 Building the Optimal Integrated Marketing Approach for a Specific Market: Increase Your Customer Base by Targeting a Valuable but Challenging Market

Fazal Siddiqi

Founder
OPAL Marketing Group

Acquire hands-on experience by being led through an integrated marketing campaign aimed at Asian-Canadians, and the second largest group, Chinese Canadians, and learn to apply this strategy to any of your next specific target markets.

- Marketing to first-generation versus second-generation Asians
- Effective words to use in your advertising and common strong beliefs of this market
- Understanding the words, images, music and even mood that should be used for the specific subgroups you are trying to reach
- The media Asian Canadians most often engage with, including the most popular TV, radio, publications, websites and mobile applications
- Best times to advertise and optimal platforms to be positioned
- Cross-channel interactive media marketing to engage these customers on all levels
- What are the key nuances required when developing a comprehensive marketing plan for this market
- Leading-edge case studies: key findings about what worked and what didn't for some large organizations in Canada

4:00 Co-Chairs Closing Remarks

DAY 2 ▶ Friday, November 30, 2012

8:15 Coffee Served

8:45 Opening Remarks from the Co-Chairs

9:00 What It Takes to Be a Leading Brand in a Competitive Market

Alfred DuPuy

Managing Director
Interbrand

Hear exactly what it takes to become a leading brand from the world's largest brand consultancy firm. Alfred Dupuy will focus on the key elements required to become a valuable brand, what it takes to stand out in a sea of nuance and the requirements for successful branding in the next 3-5 years.

9:45 Drive Profitability Through Continuous Customer Communication: How to Seamlessly Integrate and Correctly Balance Offline Programs with Digital Tactics

Dave Resnick

Head of Industry – Financial Services
Google Canada

A financial purchase is rarely spur-of-the-moment. Customers shop for a home loan for quite a while and there's a lot of research involved. The same goes for searching for a credit card with the best rewards program, or for a retirement plan. Given the amount of time that can elapse between research and decision-making, it is important to use all platforms, in addition to the digital platform, as a means for continuous customer communication and education.

Case Study

Opening
Keynote Address

1:00 to 4:00 p.m. (Registration opens at 12:30 p.m.)

B Revolutionary Strategies for Increasing ROI by Creating the Ultimate Customer Onboarding and Brand Experience

Master Class Leader:

Tal Harry
Partner
Richter7

James Marous
Senior Director
Harland Clarke Marketing Services

Matt Wilcox
Senior Vice-President
Zions Bank Interactive Services

There has never been so much pressure on financial services institutions to maximize the revenue and relationship potential of each customer. With historically narrow interest rate spreads and consumer satisfaction with many financial institutions wavering, there's a need to ensure that once a customer opens a new account, every effort is made to help the customer understand and use their account, expand their relationship, and increase loyalty to your organization. It is costing more than ever to acquire new customers, so it is imperative that you provide them with exceptional service along their entire journey as your client.

Attend this in-depth and interactive Strategy Session to hear directly from the award winning team that created The Rapid Deployment Intelligent Onboarding Program developed to reduce customer attrition, increase share of wallet and drive positive engagement with the brand. It combines insights collected at account openings and predictive modeling to drive intelligent multichannel communications and create immediate customer engagement. During a seven-month measurement period following implementation of the program, Zions Bank generated a return on its investment (in the cost of the customized onboarding program) of more than six to one; an average retention rate of 96 percent; and an increase in deposits of 40 percent when compared to the control group — exceeding the project goals by more than 200 percent.

You will be provided with a detailed investigation of the most important elements required:

- How to simplify your onboarding documentation to ensure that the initial onboarding experience is quick, efficient, and much less onerous for the customer
- Strategies for providing relevant communication, early and often
- Using the right message, with the right channel(s) at the right time
- Why it is important to encourage usage and engagement before cross-selling
- How to measure results and adjust your initiatives accordingly

Attend this session and gain the tools you need to develop an integrated approach that aligns with how customers consume media today. David Resnick will share research, data and case studies so that you can walk away with the understanding of how you should use all media and platforms for promoting your service, product or promotion – which includes mass media to support the program/initiative; direct response if the customer is in the search mode; physical mail; and merchandising if applicable. Customers may see a message in an online channel, but they might not be ready to make a decision at that point. Later they might receive a piece of mail with an offer, but it isn't until they are in the store that they see a display and ask a representative about the specific product or promotion. Digital marketing is important – but this session will remind you that it is just one tool in an extremely varied toolkit. Learn how to leverage all of them to succeed.

10:30 Networking Coffee Break

10:45 **The Latest Trends in Customer Segmentation and Predictive Modeling for the Financial Services Sector**

Mark Healy
Partner
Satov Consulting

Financial services exist because of customers, so it all comes down to them. The voice of your customer is the most important consideration because if your customer is not happy, then you're in trouble. You can have the best, most innovative products and services on the market, but if you're not giving them what they want, then they'll go somewhere else.

Today's financial consumers have disparate needs and expect a personalized, positive interaction every time in every channel. Financial services have realized that in a competitive, commoditized market, it's that customer intimacy which can give them the edge. Fortunately, a combination of technologies and strategies can enable them to lavish individual attention on customers once again.

- Convert segmentation into actionable strategies across channels by improving use of available customer data and operationalizing
- The power of information: how you can deliver the right message, to the right customer at the right time
- Increase upsell and improve retention for high value customers with analytics, real-time decisioning technology, and tiered live agent support
- How customer leads are generated from CRM, digital banners, online forums, registrations and mobile
- Learn how to apply the latest financial institution trends and segmentation practices to your organization
- Examples of successful predictive modeling strategies that can be applied to the financial services industry

12:00 Co-Chairs Closing Remarks

** A light lunch will be provided for delegates staying for the afternoon Strategy Session*

SPONSORSHIP & EXHIBITION OPPORTUNITIES

Maximize your organization's visibility in front of key decision-makers in your target market. For more information, contact Senior Business Development Executive Andrew Thompson at 416-927-0718 ext. 7232, toll-free 1-877-927-0718 ext. 7232 or by email at a.thompson@CanadianInstitute.com.

Register at 1-877-927-7936 (416-927-7936) or www.CanadianInstitute.com/MarketingFS

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YES! Register the following delegate for

Marketing for Financial Services

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2 CONTACT DETAILS

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VENUE: One King Street West Hotel
ADDRESS: 1 King Street West, Toronto, ON
TEL.: 888-451-4430

Hotel Reservations

For information on hotel room availability and reservations, please contact the One King Street West Hotel at 1-877-834-9460 and request the best available rate.

Registration Fee

The fee includes the program, all program materials, coffee breaks and lunches.

Payment Policy

Payment must be received in full by the program date to ensure admittance. All discounts will be applied to the Program Only fee (excluding add-ons), cannot be combined with any other offer, and must be paid in full at time of order. **Group discounts available to 4 or more individuals employed by the same organization, who register at the same time. For more information on group rates, please call 1-877-927-7936.**

Cancellation and Refund Policy

You must notify us by email at least 48 hrs in advance if you wish to send a substitute participant. Delegates may not "share" a pass between multiple attendees without prior authorization. If you are unable to find a substitute, please notify **The Canadian Institute** in writing no later than 10 days prior to the program date and a credit voucher will be issued to you for the full amount paid. Credit Vouchers are valid for 1 year and are redeemable against any other program by **The Canadian Institute**. If you prefer, you may request a refund of fees paid less a 25% service charge. No credits or refunds will be given for cancellations received after 10 days prior to the program date. **The Canadian Institute** reserves the right to cancel any program it deems necessary and will, in such event, make a full refund of any registration fee, but will not be responsible for airfare, hotel or other costs incurred by registrants. No liability is assumed by **The Canadian Institute** for changes in program date, content, speakers or venue.

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