

9th Annual

Digital Marketing *for* Financial Services Summit **WEST**

April 17-18, 2024

Parc 55, San Francisco, California

**THE BEST & ONLY EVENT
SERIES DEDICATED TO
FINANCIAL SERVICES
DIGITAL MARKETING
GROWTH**


**RSVP
TODAY**

New for 2024

We offer a unique immersive format that includes:



Specialized Tracks



Roundtables



Speed Networking

Step out of your comfort zone and fully engage in the experience!

Speaker Preview

... AND MANY MORE!



MAYA M. ANGLIN
VP
Product Manager
JP Morgan Chase



BRENT KORTE
SVP &
CMO
Ameritas (Insurance)



NIDHI DAGA
Senior VP
JPMorgan Chase



VERONICA MCKEE
CMO
Haverford Financial
(Investment
Management)



LINDA GOLDSTEIN
CMO
CSAA Insurance Group
(Insurance)



DWIGHT FLENNIKEN
CMO
Sunwest Bank (Bank)



ERIN MCREYNOLDS
VP Marketing &
Client Experience
Fremont Bank (Bank)



PHIL KEIKEN
SVP Digital Strategy
Farm Credit Services
of America (Credit
Union)



SCOTT SPIDELL
VP Marketing Strategy
First Command
Financial (Investment
Management)



PAUL GASPAR
CDO
Corvus (Insurance)



EMMA FRANKS
AVP Marketing
TAB (Bank)



ARA JAINGUE
First Vice President
Martech &
Omnichannel
Axos Bank (Bank)





Who Attends?



AGENDA - DAY 1

Wednesday, April 17, 2024

7:45 AM NETWORKING BREAKFAST: BUILD COMMUNITY CONTACTS

- Start your day off right and connect with **digital marketing leaders**.
- Get to know your **industry peers** and colleagues over a delicious breakfast.
- Source practical tips, discuss **best practices** and prepare for the day ahead.

8:45 AM OPENING COMMENTS FROM YOUR HOST

Gain insight into today's sessions so you can get the most out of your conference experience.

9:00 AM OPENING FIRESIDE KEYNOTE: FUTURE-PROOF YOUR DIGITAL MARKETING THE MARKET

Develop Strategies That Can Adapt to the Ever-changing Marketing Landscape

The acceleration of digital marketing trends and technologies has brands reevaluating their approaches. Increase sales with both your existing and new customers by tactically prioritizing growth in 2024 and beyond. Implement best practices to:

- Build meaningful customer relationships based on trust.
- Adopt privacy-forward technology to deliver reach, measurement and campaign optimization across audiences without the reliance of cookies
- Identify which customers are primed for conversion and which are better suited for lead nurture campaigns.

Build a powerful marketing funnel with high-quality prospects.

Nidhi Daga, Senior VP, Growth for Digital Commercial Real Estate, **JPMorgan Chase & Co.**
Maya M. Anglin, VP, Product Manager, **JPMorgan Chase**

9:30 AM C-SUITE PANEL: CMO POWER PANEL

Maximize Your Marketing ROI Across All Channels

In a world where digital marketers are under pressure to achieve more with fewer resources, leading executives are focused on maximizing the effectiveness of their marketing strategies, ensuring they yield tangible results. Optimize your overall marketing strategy and simultaneously minimize its impact on your budget. Take back to your office strategies to:

- Define how technology, including AI, can increase the number of strategies available to marketing executives
- Attribute success to increasingly complex marketing channels, reducing costs and increasing return on investment (ROI).
- Transform your email, social media, and SEO campaigns, mastering the strategy for each.

Perfect your marketing strategy and align your resources to significantly increase ROI.

Brent Korte, SVP & CMO, **Ameritas**
Dwight Flenniken, CMO, **Sunwest Bank**
Josephine Chew, CMO, **SF Fire Credit Union**

TRACK 1 INDUSTRY EXPERT

10:00 AM DIGITAL BRAND EQUITY

How to Get Your App on the Home Screen & Stay Top of Mind

Securing a place on the home screen of a device is the ultimate goal for app placement, but it's a challenging feat. Master your ability to consistently stay top of mind for your client. Take away specific solutions to:

- Transform your application strategy, keeping customers in your ecosystem and driving revenue growth.
- Master the art of enhancing brand equity, leading to a substantial increase in engagement rates.
- Improve your bottom line by maintaining your marketing efforts in-house, allowing for greater customization at a significantly reduced cost.

Adapt your application strategies to increase brand equity with your existing customers.

iQuanti

TRACK 2 INDUSTRY EXPERT

10:00 AM MARKETING ON DIGITAL PLATFORM

Perfecting Short Content for Younger Generations to Drive Long-Term Revenue

As TikTok, YouTube Shorts, and Instagram Reels lead the short-form content revolution, harnessing this marketing channel to reach younger generations is essential. Supercharge your short media strategy by shifting away from purely promotional content and focusing on authenticity. Master the success factors to:

- Amplify your genuine connection with the audience, moving beyond sales-driven content.
- Highlight your societal impact, resonating with a socially conscious generation.
- Leverage this connection for soft selling and customer acquisition.

Adapt your targeted short content to impact your bottom line for years to come.

Tom Fricano, Senior Practice Director for Strategy & Consulting, **PossibleNow**

10:30 AM SPEED NETWORKING! → MAKE MEANINGFUL CONNECTIONS

Grow your network by meeting like-minded individuals to share your latest ideas and projects with:

- Enjoy a quick icebreaker, exchange LinkedIn information, and **build lasting business relationships**.
- Achieve your conference networking goals in a **fun and agile fashion**.
- **Join a community** of digital marketing experts and gain invaluable support.

11:30 AM PANEL: CREATING THE STICKEST CONTENT

Stay Relevant and Memorable to Retain Your Current Clients and Win New Business

As organizations generate content at an unprecedented pace, how do you stand out and create a lasting impression in a highly competitive market? Improve your content and show measurable results. Source practical tips to:

- Leverage templates to expedite the creation of high-quality marketing materials.
- Adapt agile techniques, emphasizing speed and adaptability to respond swiftly to evolving market demands.

AGENDA - DAY 1

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- Showcase your community involvement, volunteer efforts, or philanthropic initiatives to add a unique touch that captures attention, essentially the “X-Factor”.

Optimize the quality of your content to retain your clients and secure new ones.

Jennifer Couch, Marketing Director, **Caprock**

Erin Slater, Head of Financial Services Strategy and Growth, **Quad**

12:00 PM PRESENTATION: THE QUANTUM LEAP

Architecting an AI Powered Mar Tech Stack And Organization

Marketers are actively exploring ways to effectively integrate AI into their strategies, but it's crucial to understand the type of research that will guide your efforts. Adapt the right solutions for your business. Walk away with an action plan to:

- Adapt and modify your models to detect anomalies and eliminate the risk of misinformation.
- Streamline your questions to focus on essential information, reducing unnecessary details and potential loss in quality.
- Get ready to leapfrog the competition by incorporating AI at every level from Martech stack to your organizational DNA
- Predict the next seismic shifts in AI-driven marketing pioneer them.

Catalyze your transition into an AI-powered organization, ready for immediate execution.

Ara Jaingue, First Vice President, MarTech & Omnichannel, **Axos Bank (Bank)**

12:30 PM NETWORKING LUNCH: DELVE INTO INDUSTRY CONVERSATIONS

- Meet interesting speakers and pick their brains on the *latest industry issues*.
- *Expand your network* and make connections that last beyond the conference.
- Enjoy great food and service while engaging with your *digital marketing colleagues*.

1:30 PM EXHIBITOR LOUNGE: VISIT BOOTHS & WIN PRIZES

- Browse through different sponsor booths and *test drive new technology*.
- Enter your name for a chance to *win exciting prizes*.
- Take advantage of *event-specific offers* and special content.

TRACK 1: INDUSTRY EXPERT

1:45 PM AI LEADERSHIP

Now It's Here: How Do You Maximize Effectiveness and Minimize Risk to Exponentially Boost Productivity?

As AI takes center stage in the industry, questions remain about how to unlock its full potential. Transform your AI strategy

TRACK 2: INDUSTRY EXPERT

1:45 PM AVOIDING PITFALLS

Best Practices in Learning from Successes and Failures

Not all marketing campaigns succeed, but understanding the reasons behind both success and failure is crucial to prevent the repetition of mistakes. Reduce your

into a leading-edge one that can skyrocket productivity. Adopt best practices to:

- Leverage insights from the forefront of marketing thought leadership on AI and its transformative impact on your marketing strategies.
- Mitigate hidden risks, including discrimination or disclosure, so unseen pitfalls don't derail your marketing activities.
- Bolster your content production with AI, giving you more time to think critically and strategize for your customers.

Amplify your ability to produce collateral to increase your customer base and minimize risks.

CEROS

TRACK 1: BANKS & CREDIT UNIONS

2:15 PM FIRESIDE: CONTENT MARKETING

How To Connect with Your Customer

Marketers occasionally face situations where conveying less captivating messages, such as informing customers about potential fraud, is necessary. Transform your strategy to successfully engage your customers with seemingly unexciting content. Develop a blueprint to:

- Achieve practical tips on how to transform obligatory messages into engaging and relevant content.
- Amplify your customer interactions, leading to improved customer retention rates.
- Elevate the quality of content related to fraud, enabling you to boost soft-engagement and achieve higher ROI across multiple marketing channels.

Bolster your obligatory messaging strategy to increase customer engagement.

Ernest Kuo, AVP Channel Marketing, **The Police Credit Union (Credit Union)**

likelihood of wasting time and resources through a key actionable case study. Adopt best practices to:

- Recognize the signs of a failing marketing strategy and learn how to mitigate its internal and external impact.
- Heighten your ability to turn a challenging situation around by identifying successful elements and eliminating those that have proven ineffective.
- Develop a culture of continuous learning, where failure serves as a valuable stepping stone on the path to success.

Optimize your approach by learning from your recent marketing experiences to save time and resources.

SPRINKLR

TRACK 2: INSURANCE

2:15 PM PRESENTATION: AUTOMATION & VALUE CREATION

Value Creation Opportunities Within the Insurance Value Chain.

Generative AI tools, with their multi-modal capabilities, create the potential for automation and value creation opportunities within all of the processes that they touch. Transform your organization with early adoption across various parts of the insurance value chain and where companies are bidding their time in terms of experimenting with potential solutions. Take an inventory of opportunity and risk across a broad spectrum of business processes to promote key considerations for building capability and experience around generative AI over time by

- Taking an overview of the insurance value chain from sales and distribution to underwriting/pricing to claims and policy renewal.
- Checking on where we are seeing AI experimentation and what it is being used for to create value.
- Figuring out some of the potential risks that we and others see

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Alicia Palalej, Digital Marketing Manager, **The Police Credit Union (Credit Union)**

- Integrating capabilities required to support AI and how they might be organized in an enterprise.

Integrate appropriate tools when thinking about leading AI initiatives at your company

Paul Gaspar, CDO, **Corvus**

TRACK 3: INVESTMENT MANAGEMENT

2:15 PM PRESENTATION: THE BRAND REPUTATION EQUATION

A Layered Reputation Strategy to Increase Low Funnel Conversion

Develop and implement a reputational strategy using multi-channel methods to counter negative reputation and build trust in your brand. Create a roadmap to:

- Build a multi-layered approach of paid search, digital content, and proactive web articles we can combat negative content.
- Integrate techniques to audit and reverse engineer keywords to build effective SEM and SEO programs.
- Strategize and build tactics to leverage reviews and testimonials as an effective reputational channel.

Increase your reputation value directly correlated to prospect trust and conversion.

Scott Spidell, VP Marketing Strategy, **First Command Financial**

TRACK 1: INDUSTRY EXPERT

TRACK 2: INDUSTRY EXPERT

2:45 PM THRIVING IN THE WAR FOR DEPOSITS

How To Drive Strategically Significant Core Deposits at Half the Cost

Alisha Crafton, Chief Growth Officer, **KASASA**

2:45 PM THE DATA REVOLUTION

Utilize Data-driven Marketing to Inform Your Decision Making and Gain a Competitive Advantage

Companies use data-driven marketing to create personalized products, content and campaigns on social media and other channels. Optimize your marketing ROI by assembling a cross-disciplinary team and determining your data needs. Master the success factors of:

- How to base your marketing automation strategy on data
- How to employ marketing automation tools to analyze data
- How to measure the right results

Implement personalization across your websites, mobile apps and other digital experiences for a greater ROI.

Matt Roche, CEO, **Extole**

3:15 PM EXHIBITOR LOUNGE: ATTEND VENDOR DEMOS & CONSULT INDUSTRY EXPERTS

- Enjoy **exclusive sponsor demos** and experience the next level of digital marketing innovation firsthand.
- Meet one-on-one with leading solution providers to **discuss organizational hurdles**.
- Brainstorm solutions** and gain new perspectives and ideas.

TRACK 1: BANKS & CREDIT UNION

TRACK 2: INSURANCE

3:45 PM CAPTURING ATTENTION

Secure New Customers and Re-Engage with Your Existing Customers

Amid significant technological changes and the potential for substantial growth, navigating economic challenges requires a deep understanding of how to captivate your audience across various channels. Maximize your ability to position yourself in front of, and maintain the attention of, your target market. Achieve a step-by-step action plan to:

- Understand what the market demands and how you can deliver value
- Excel at recognizing the elements that seize attention and compel customers to engage with your brand
- Combine these insights to build a flawless marketing plan

Amplify how you capture attention to attract new customers while retaining your existing ones.

Jeremy Preimesberger, VP, Marketing, **Cabrillo Credit Union**

3:45 PM PRESENTATION CONVERGENCE OF DIGITAL MARKETING PROMOTION & CULTURALLY RELEVANT MESSAGING

How to Develop Creative & Messaging Combined with Digital Targeting Translated into Off the Chart Results

The Hispanic consumer is projected to account for 78% of the net new workers from 2020 to 2030. This makes them a segment impossible to ignore if you want to grow your business. Create a blueprint to:

- Avoid only translating your communications to this segment as opposed to committing to cultural transcreation of your marketing strategy to not fall short of ROI.
- Create a specific Hispanic Audience Messaging Framework to understand the key cultural insights that will resonate with the Hispanic Consumer.
- Cultural moments' drive creative opportunity.

Improve your marketing approach to stay ahead of the competition and win market share.

Eugene Santos, Marketing Director, **Prudential**

AGENDA - DAY 1

Wednesday, April 17, 2024

TRACK 3: INVESTMENT MANAGEMENT

3:45 PM SPOTLIGHT SESSION: INHOUSE STRATEGIES

Maximizing Team Cohesion to Maximize Revenue

Building and nurturing an in-house team that rivals agencies in quality, despite having fewer resources, can be a challenging endeavour. However, as agencies become more expensive and the desire to create internal ecosystems grows, optimizing your in-house team is essential for maximizing profits. Adopt best practices to:

- Champion projects to completion, maximizing ownership and overall quality.
- Impact your staff with cross-training opportunities, enabling them to contribute to strategic decisions across the business.
- Achieve a comprehensive understanding of the sales process, making small tweaks to marketing processes that can yield substantial revenue results.

Boost your internal team's cohesion to increase revenue and achieve your business objectives.

Steven Soares, VP, Intelligent Solutions Learning, **JP Morgan Chase**

4:15 PM PRESENTATION: FORECASTING UNCERTAINTY

Excel Modelling to Overcome Data Limitations

In an ever-changing industry, effective decision-making relies on robust data. Integrating uncertainty variables into statistical models can enhance the creation of actionable and defensible forecasts, addressing challenges related to external market events, evolving consumer preferences, untested channels, new strategic initiatives, and the anticipated inflationary rise of marketing costs in 2024. Source practical tips to :

- Recognize how uncertainty can affect your company's strategic objectives and select the appropriate variables to consider.
- Transform your predictive capabilities with data-driven models that control for uncertainty, providing more clarity about future potential outcomes.
- Increase confidence in your marketing and business KPI forecasts through multi-iteration sensitivity analyses.

Optimize your forecasting approach to generate a better picture of your marketing outcomes.

Emma Franks, AVP Marketing, **TAB Bank**

4:45 PM CLOSING COMMENTS FROM YOUR HOST

Review the key solutions and takeaways from today's sessions. Source a summary of action points to implement in your work. Discuss tomorrow's highlights!

5:00 PM EVENING RECEPTION: ENJOY GREAT CONVERSATION, MUSIC & NETWORKING

- **Relax and unwind** with tasty cocktails after a long day of learning
- Don't miss your chance to win fun prizes at our **Reception Gift Giveaway**
- Make dinner plans with your **new connections** and explore the best of what San Francisco nightlife has to offer, just be sure to set your alarm for Day 2!

5:30 PM CONFERENCE ADJOURNS TO DAY TWO



AGENDA - DAY 2

Thursday, April 18, 2024

7:45 AM NETWORKING BREAKFAST: BUILD COMMUNITY CONTACTS

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9:00 AM FIRESIDE KEYNOTE: GIVE CUSTOMERS A VOICE IN A WORLD FULL OF NUMBERS

The Rising Necessity Of Today's Chief Information / Digital Officer

A successful CIO/CDO will leverage VoC data to better personalize their marketing approach and strengthen loyalty to ensure company-wide customer centricity. Capture VoC data through customer touchpoints with your business and not your competitors. Adopt best practices to:

- Analyze and utilize VoC data correctly, making it unique and highly valuable
- Increase customer retention and decrease customer service costs year after year
- Embrace your digital habits and meet customers where they are through unified, consistent experiences

Solicit new ideas from your customer success team to increase profitability.

Shabina Anwar, VP, Loyalty, **Mastercard**

9:30 AM C-SUITE PANEL: AI LEADERSHIP

How to Build your Own Ecosystem and Monopolize Customer Attention

As traditional media sources become harder to measure and more crowded, establishing your exclusive ecosystem where you are the sole marketing authority is imperative. Heighten your customers' experience by immersing them in your ecosystem, ensuring their undivided attention. Master the success factors to:

- Excel at understanding what motivates your customers to enter your ecosystem.
- Highlight what will keep them engaged and continue to focus their limited attention on your marketing.
- Optimize your ecosystem, including UI, UX, push notification design, and frequency, to effectively convert attention into engagement and sales.

Enrich your own ecosystem to captivate your customer base, turning their attention into revenue.

Linda Goldstein, CMO, **CSAA Insurance Group**

Veronica McKee, CMO, **Haverford Financial**

Phil Keiken, SVP Digital Strategy, **Farm Credit Services of America**

TRACK 1: INDUSTRY EXPERT

10:00 AM ACCELERATE YOUR TIME TO VALUE WITH COMPOSABLE MARTECH

Getting A Head Start On Your Digital Transformation

In the age of AI and composable tech, planning and implementing a digital transformation may seem daunting. There can be many decision points and the promise of composable can sound too good to be true. Move to a modern, headless CMS that may provide a lower TCO by:

- Executable financial Services business case
- Consideration and value of product accelerator
- Tech demo

Adopt composable methodology to increase efficiency and functionality of your teams and technology

Dave Stawinski, Vice President, Digital Delivery, **XCentium**

TRACK 2: INDUSTRY EXPERT

10:00 AM THE IMPORTANCE OF ACHIEVING PRIMACY TO DRIVE GROWTH

How To Achieve and Deepen Primacy with Customers

The industry agrees - the ultimate goal for customer acquisition is to win the primary banking relationship. However, there remains many unknowns around how to define primacy, how to measure it, and what types of customer experiences are required to achieve it. Take away actionable strategies on:

- How to define and measure primacy
- What banks should be doing to drive primacy with today's consumer, including channels, products and loyalty
- Primacy insights found during research conducted by the Financial Brand and consumer polling

pinwheel API

10:30 AM SPEED NETWORKING! → MAKE MEANINGFUL CONNECTIONS

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- Enjoy a quick icebreaker, exchange LinkedIn information, and **build lasting business relationships**
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11:30 AM FIRESIDE: NAVIGATE THE SHIFT FROM PHYSICAL CHECKS TO VIRTUAL CARD PAYMENTS

Optimizing AP Spend by Shifting Spend from Physical Checks/ACH To Virtual Card Payments.

Implementing e-Payments, such as virtual cards, real-time payments, and more empowers you to boost effectiveness, insight, and security while reducing expenses and saving time on conventional procedures. Take away executable strategies to:

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- Coming up with ways to endorse Pcard payments to suppliers.
- Analyzing how a spend file can yield additional opportunities.
- Introducing some Fintech partners that are unique in the B2B space.

Colleen Miller, Director of Sales, **Visa**.

12:00 PM CASE STUDY: STANDING OUT AMONGST THE CROWD

Be Distinctive to Increase Your Audience Engagement

In a saturated market, achieving differentiation is crucial for marketing success, but establishing that distinctiveness can be challenging. Recognize your Unique Selling Proposition (USP), such as the localization aspect compared to larger competitors, to enhance your credibility in the eyes of your customers. Take away specific solutions to:

- Clearly define your USP and its essence, providing a competitive advantage
- Understand why a simple USP like localization can set you apart from larger competitors.
- Transform your USP into tangible income from your target audience.

Perfect your USP to increase viewership and drive sales.

Nicole Campbell, SVP, Marketing & Communications, **National Commercial Bank Jamaica Ltd.**

12:30 PM NETWORKING LUNCH: DELVE INTO INDUSTRY CONVERSATIONS

- Meet interesting speakers and pick their brains on the **latest industry issues**
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1:30 PM EXHIBITOR LOUNGE: VISIT BOOTHS & WIN PRIZES

- Browse through different sponsor booths and **test drive new technology**
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TRACK 1: SOCIAL MEDIA AND CONTENT STRATEGY

TRACK 2: ENDEMIC ADVERTISING & MEDIA VS PROGRAMMATIC

1:45 PM FIRESIDE: THE VOICE OF A NEW SOCIAL MEDIA MARKETER

Maximizing Your Impact on Social Media

Take away essential strategies and tactics to effectively use social media. Engage both consumer and business audiences.

1:45 PM FIRESIDE: HOW PARTNERS MEDIATE PLATFORM POWER

Yield Higher ROI With Endemic Marketing

Financial services can benefit from catering to a specific niche and having advertisers approach them. The rise of social media has had a huge impact on endemic advertising. Create an actionable strategy to:

- Choosing the Right Platforms: **Guidance on the most effective social media platforms for different audience types within the financial sector.**
- Developing and Implementing a Strategy: **Practical steps for creating a content calendar, building an audience, and utilizing keywords and hashtags to increase visibility.**
- Actionable Strategies for Marketing Leaders: **Insights into successful social media strategy planning, launch, and growth for financial services marketing leaders.**

Claire Kurlmel, Director, Channel Marketing, **Parnassus Investments** MODERATOR

TRACK 1: SOCIAL MEDIA AND CONTENT STRATEGY

2:15 PM CASE STUDY: CONTENT THAT FEELS BRAND ALIGNED

How to Share Your Content Consistently and Measure Results

Companies use data-driven marketing to create personalized products, content and campaigns on social media and other channels. Optimize your marketing ROI by defining and measuring your social media content. Master the success factors of:

- How do you make your content organic and paid, incorporating budgets of varying sizes.
- How to employ content marketing strategies as compared to data analysis for social media.
- How to measure the right results.

Implement personalized content marketing across all digital experiences for a greater ROI.

Sarah Marshall, Digital Marketing Specialist, **Mechanics Bank (Bank)**

- Take your campaigns to a whole new level by targeting only those who would be truly interested in your product.
- Increase purchase interest by a significant percentage using endemic advertisement
- Create more relevant ad campaign tailored for your targeted audiences

Make your brand access exclusive ad placements to connect with consumers while they are in an active shopping mindset

Erin McReynolds, VP, Marketing & Client Experience, **Fermont Bank (Bank)**

TRACK 2: DATA & INSIGHTS

2:15 PM PRESENTATION

Synthesizing Your Data into a Reliable Revenue Stream

Collecting data is the first step, but processing and extracting valuable insights from it is where the true challenge lies. Maximize your ability to identify meaningful patterns and narratives within your data and transform this knowledge into a tangible ROI by crafting more focused and relevant marketing campaigns. Develop a blueprint to:

- Highlight key manual and technological techniques for uncovering valuable insights within your data
- Accelerate your understanding of your customer base, identifying key marketing areas to exploit.
- Reduce your reliance on clunky analytical software, enabling you to focus on reaching and converting your target audience

AGENDA - DAY 2

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Transform your data handling techniques to increase revenue and customer retention.

Mike Croth, VP, Head of Digital Marketing, **Matthews Asia (Investment Management)**

2:45 PM EXHIBITOR LOUNGE: ATTEND VENDOR DEMOS & CONSULT INDUSTRY EXPERTS

- Enjoy **exclusive sponsor demos** and experience the next level of digital marketing innovation first-hand
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TRACK 1: INDUSTRY EXPERT

TRACK 2: INDUSTRY EXPERT

3:15 PM IN-HOUSE STRATEGIES

Maximizing Team Cohesion to Maximize Revenue

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Boost your internal team's cohesion to increase revenue and achieve your business objectives.

3:15 PM WEB CONTENT STRATEGY

Lift Sales Results Through Cx Based Content Marketing

The Customer is at the center of everything we do and measure in digital marketing. Scale up your business by learning best-in-class strategies to marry content marketing assets to customer journey stages in an agile digital marketing campaign to continuously lift sales. Develop an action plan to:

- Make the customer journey your guidepost effective digital marketing campaigns.
- Draft the myriad of key stakeholders to involve - from sales to product to underwriting to analytics.
- Move from a traditional to an agile go-to-market approach.

Customize your content to meet your precise business needs.

3:45 PM CLOSING KEYNOTE: PARTNER MARKETING

Utilize Partner Marketing to Bolster Revenue

As financial advisors are increasingly assigned marketing responsibilities, it's crucial for insurance and investment companies to adapt swiftly. Boost your bottom line by collaborating with advisors who are eager to engage in marketing efforts and creating research-based portfolio. Adopt best practices to:

- Ensure all advisors have easy access to marketing collateral.
- Act as a 360 agency for your clients, developing strategies and assets together.
- Provide guidance on ways to build their own roadmap that extends beyond prospecting.

Achieve an active strategy to increase your revenue per customer and drive business growth.

Rich Smith, CMO, **Pen Fed Credit Union (Former)**

4:15 PM CLOSING COMMENTS FROM YOUR HOST

Review the key solutions and takeaways from the conference. Source a summary of action points to implement in your work.

4:30 PM CONFERENCE CONCLUDES



“

“Encouraging to see innovative and creative ways to solve issues, constraints, and challenges in a highly regulated industry.”

SVP, Digital Marketing & Content Strategy, Bank of America



“

“The wealth of experience at the conference is amazing. If you are in the Digital Marketing field for Financial Services, this is one of the must-see, must-attend conferences.”

VP, Digital, Macquarie Banking and Financial Services

“

“One of the best parts about events like this is actually getting to hear case studies, instead of the op-ed pieces you can read about in a blog. Really seeing the strategy go through with the analytics and results has been very helpful for us.”

Digital Marketing Strategist, Lincoln Financial Group

“

“Excellent quality of presenters. Good variety of topics around digital issues, even beyond marketing.”

AVP, Strategy, Standard Life

“

“The speakers have been great... Brainstorming and gathering different ideas and approaches to figure out where to go next to be a leader and provide the experience we want all our customers to have.”

AVP - Product Marketing, Horizon ETFs



“

“It was a great experience. It was really interesting to hear different perspectives on what is a bit of a niche industry and niche practice. I’ve been to other marketing conferences that are a bit more broad, so I felt like at this particular conference I was able to write down a lot of key takeaways that I can implement in what I do every day.”

Vice President, Strategy & Research, State Street Global Advisors

9th Annual

Digital Marketing *for* Financial Services Summit **WEST**

April 17-18, 2024

Parc 55, San Francisco,
California

Two days of unmatched insights, debates, and networking!

UNLOCK DIGITAL MARKETING RESILIENCE:

Stay ahead of the curve in the fast-paced digital landscape alongside the industry's finest.

CMO Insights for Unmatched ROI:

Get insider tips from top CMOs, including those from the household names you admire.

Reputation Management Mastery:

Learn from the best on how to craft an ironclad reputational strategy that builds trust in even the toughest situations.

Elevating Content Engagement:

Exchange ideas with marketing powerhouses on transforming everyday communications into captivating content.

Innovating Insurance with AI:

Debate the transformative potential of AI with industry leaders, shaping the future of finance.

