

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**



# New for 2024

We offer a unique immersive format that includes:



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

# Speaker Preview

... AND MANY MORE!



**SHABINA ANWAR**  
VP  
Loyalty  
Mastercard



**BRENT KORTE**  
SVP &  
CMO  
Ameritas



**NIDHI DAGA**  
Senior VP  
JPMorgan Chase & Co.



**MAYA M. ANGLIN**  
VP  
Product Manager  
JP Morgan Chase



**VERONICA MCKEE**  
CMO  
Haverford Trust



**LINDA GOLDSTEIN**  
CMO  
CSAA Insurance Group



**NINA WEBSTER**  
SVP  
Amalgamated Bank



**DWIGHT FLENNIKEN**  
CMO  
Sunwest Bank



**STEVEN SOARES**  
VP  
Intelligent Solutions  
Learning  
JP Morgan Chase



**ERIN MCREYNOLDS**  
VP Marketing &  
Client Experience  
Fremont Bank



**EMMA FRANKS**  
AVP Marketing  
TAB



**SCOTT SPIDELL**  
VP Marketing Strategy  
First Command  
Financial



# 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.

**HOST: LeAnita Ragland-Brooks**, Managing Director, VP, **Prudential Financial (former)**

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

### 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.*

**Maya M. Anglin**, VP, Product Manager, **JPMorgan Chase**

**Nidhi Daga**, Senior VP, Growth for Digital Commercial Real Estate, **JPMorgan Chase & Co.**

**MODERATOR**

## 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**

**Nidhi Daga**, Senior VP, Growth for Digital Commercial Real Estate, **JPMorgan Chase & Co.**

**MODERATOR**

## TRACK 1 INDUSTRY EXPERT

### 10:00 AM THE POWER OF DUO

#### The Synergy of Paid and Organic Search

A multi-channel, holistic approach is a must in today's digital age. As teams and channels have been segmented, financial marketers are forced to find synergies on how paid and organic search can work together to maximize the overall digital shelf space. Create an actionable approach to:

- Develop a cohesive search strategy.
- Understand the roles of the channels and how they can complement each other.
- Understand key factors and ways to deliver a connected search program.

*Develop methodologies for integrated search*

**Wayne Cichanski**, Vice President, SEO & Site Experience, **iQuanti**

## TRACK 2 INDUSTRY EXPERT

### 10:00 AM TRANSFORM CX WITH PREFERENCE DATA

#### Unlock Superior Financial Services CX with Consent & Preference Data

Companies use all types of data to anticipate customer needs and provide tailored experiences. However, most data provides companies with insights that only allow them to infer customer needs. Additionally, third-party data is becoming increasingly restricted due to growing privacy laws.

- Leverage customer provided consent and preference data transforms CX in financial services by eliminating guesswork. Key elements of superior CX
- Regulatory drivers that impact marketing communications
- Strategies for implementing an effective consent and preference approach

*Unpack strategic approaches for harnessing direct customer insights.*

**Tom Fricano**, Senior Practice Director for Strategy & Consulting, MetLife, Principal Financial, Andersen Windows **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.

### 11:00 AM 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.

# AGENDA - DAY 1

Wednesday, April 17, 2024

## TRACK 1: INVESTMENT MANAGEMENT

### 11:30 AM PANEL: CONTENT STRATEGY - 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.
- 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**  
**LeAnita Ragland-Brooks**, Managing Director, VP, **Prudential Financial (former)** MODERATOR

## TRACK 1: INVESTMENT MANAGEMENT

### 12:00 PM PRESENTATION: INHOUSE STRATEGIES

#### Maximizing Team Cohesion to Maximize Revenue

Building and nurturing an in-house team that rivals agencies in quality,

## TRACK 2: BANKS/CREDIT UNIONS/INSURANCE

### 11:30 AM 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:

- Weave AI into your channel strategies subtly yet powerfully, enhancing customer interactions without compromising on regulatory compliance.
- Adapt your MarTech stack with AI capabilities that transform your organizational DNA.
- Predict the next seismic shifts in AI-driven marketing and how to pioneer them.

*Walk away with a blueprint tailored to harness the dynamic power of AI, equipping you to craft cutting-edge digital marketing strategies that resonate and convert.*

**Ara Jaingue**, First Vice President, MarTech & Revenue Operations, Enterprise Marketing, **Axos Bank**

## TRACK 2: BANKS/CREDIT UNION/INSURANCE

### 12:00 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

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**

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**

## 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

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## TRACK 1: INDUSTRY EXPERT

### 1:45 PM FIRESIDE: INTERACTIVE CONTENT TO SET APART FROM COMPETITORS

How Financial Services Companies Are Leveraging Interactive Content to Differentiate, Disrupt, and Delight.

## TRACK 2: INDUSTRY EXPERT

### 1:45 PM MAKE SOCIAL MEDIA THE HEART OF YOUR BUSINESS STRATEGY

How To Streamline Your Marketing Efforts, Boost Revenue, And Maintain Regulatory Adherence with Actionable Insights, Personalized Campaigns, And Stringent Compliance Measures.

# AGENDA - DAY 1

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Uncover the transformational power of interactive content in the financial services industry, and how brands are using it to create standout customer experiences that set themselves apart from competitors. Take away strategies to:

- Exploring the shift towards interactive content with a focus on real-world success stories
- Using interactive content creation for financial services companies and how its solving common pain points
- Discovering future trends in content and how leveraging AI can help marketers adapt in this ever-evolving landscape

**Kristi McMillin**, Sr. New Business Director, **CEROS**

**LeAnita Ragland-Brooks**, Managing Director, VP, **Prudential Financial (former)** **MODERATOR**

## TRACK 1: INVESTMENT MANAGEMENT

### 2:15 PM AUTOMATION & VALUE CREATION

#### PRESENTATION: 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

Address the inefficiencies and compliance challenges in social and digital engagement faced by Finserv companies. Streamline lead generation, improve conversion rates, and ensure robust compliance by.

- Optimizing lead generation and revenue by leveraging Sprinklr's infrastructure for compliant social engagement.
- Enhancing conversion rates through personalized, on-brand campaigns tailored to local market needs.
- Ensuring robust compliance across all prospect communications to build trust and avoid potential crises.

**Tyler Altrup**, Director, Unified-CXM Best Practices, **Sprinklr**

## TRACK 2: BANKS/CREDIT UNIONS/INSURANCE

### 2:15 PM PRESENTATION: CONTENT MARKETING

#### Information vs Engagement

Today, content creation is driven by the need to engage your target audience. But not all content fits that mold as marketers for Financial Institutions must balance creating captivating content with essential but less engaging topics such as fraud prevention, operational updates that have a direct audience impact, etc. Develop strategies to:

- Make essential content more engaging
- Find the right communication frequency for your audience
- Find the optimal frequency across different channels to effectively reach your audience.

- 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
- 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 1: INDUSTRY EXPERT

### 2:45 PM THRIVING IN THE WAR FOR DEPOSITS

#### How To Drive Strategically Significant Core Deposits at Half the Cost

High-yield CDs may bring in deposit dollars, but they also come with a near-unsustainable cost of funds, high attrition, rate shoppers, ongoing liquidity struggles, constant repricing, and more. That's not real growth. That's phantom growth. It's time for a new approach to retail checking and savings and create real growth by:

- Changing the math: Increasing deposits and growing at a lower Cost Of Funds.
- Perfecting the offer: Going to market in a proven way that drives results.
- Managing the surprises: Optimizing program performance through regular analysis and consultation.

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

*Bolster your obligatory messaging strategy to increase customer engagement.*

**Ernest Kuo**, AVP Channel Marketing, **The Police Credit Union**  
**Alicia Palalej**, Digital Marketing Manager, **The Police Credit Union**

## TRACK 2: INDUSTRY EXPERT

### 2:45 PM CUSTOMER-LED GROWTH

#### CLG; The Key to Efficient Growth in Financial Services

Financial service companies are struggling with high customer acquisition costs and low retention rates. Leading companies are adopting Customer-Led Growth (CLG), a solution to acquire higher-quality members at a lower cost. Source actionable strategies for:

- Referral programs and advocacy marketing.
- Targeted incentives, challenges and journey-based engagement.
- Building a more loyal customer base.

*Increase profitability of new customers and drive engagement and product adoption*

**Matt Roche**, CEO, **Extole**

# AGENDA - DAY 1

Wednesday, April 17, 2024

## 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: INVESTMENT MANAGEMENT

## 3:45 PM PRESENTATION: 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 Financial**

### TRACK 2: BANKS/CREDIT UNIONS/INSURANCE

## 3:45 PM FIRESIDE: 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**  
**Rich Smith**, Chief Marketing Officer, **Vojomo Holdings** MODERATOR

## 4:15 PM CLOSING KEYNOTE: 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!

**HOST: LeAnita Ragland-Brooks**, Managing Director,VP, **Prudential Financial (former)**

## 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

- Start your day off right and connect with **digital marketing leaders**.
- Get to know your **industry peers** and colleagues over a delicious breakfast.
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## 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.

**LeAnita Ragland-Brooks**, Managing Director,VP, **Prudential Financial (former)**

## 9:00 AM OPENING KEYNOTE: DRIVE CUSTOMER LOYALTY THROUGH EFFICIENT PRODUCTS

### Optimize your loyalty products and platforms to maximize impact

In this evolving world, it takes several products, platforms, capabilities, and strategies to effectively engage consumers and drive loyalty as an outcome. Take away best practices to:

- Organize and optimize your loyalty solutions to maximize ROI.
- Amplify the impact of innovation to enable multiple use-cases and strategies.
- Embrace personalization, consumer centricity and data-driven insights to drive incremental value.

*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 Trust**

**Carl Horne**, VP Digital, **Farm Credit Services of America**

**LeAnita Ragland-Brooks**, Managing Director,VP, **Prudential Financial (former)** MODERATOR

## 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

**Nicole Murphy**, Head of Product Marketing, **Pinwheel API**

**Rich Smith**, Chief Marketing Officer, **Vojomo Holdings**

## 10:30 AM EXHIBITOR LOUNGE: VISIT BOOTHS & WIN PRIZES

- Browse through different sponsor booths and test drive new technology
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## 11:00 AM ROUNDTABLES -> DISCOVER THOUGHT-PROVOKING IDEAS

Take a deep dive down the innovation rabbit hole in one of our roundtable discussions. Share common challenges and best practices with your customer experience peers on a topic of your choosing:

1. **AI Powered Creativity:** Delve into the power of AI at each interaction.
2. **Interactive Content Creation:** Leverage SEO on a digital platform
3. **Communication:** Enhance customer and seller experiences through better communication.

# AGENDA - DAY 2

Thursday, April 18, 2024

- 4. **Audit & Compliance:** Leverage customer intelligence you can bank on adhering to all compliance matters.
- 5. **Conversion Rate Optimization:** CRO through SEM, Digital and Paid Media etc.

## 11:30 AM FIRESIDE: IMPACT OF DIGITAL PERSONALIZATION

### Create Your Personalization Roadmap for Long-Lasting Customer Relationships

It is well established that digital personalization strategies have a direct impact on business growth, but to create 1:1 relationship at scale, brands need to create a single customer view at the customer, campaign and retail level. Create a blueprint to:

- Prioritize personalization strategies.
- Define key metrics required for building a single customer view.
- Make your tech stack work for you.

*Embed 360 Customer View in your marketing framework*

**Gary Schoch**, Senior Vice President Global GTM CX Studio Leader, **HCL America**  
**LeAnita Ragland-Brooks**, Managing Director, VP, **Prudential Financial (former)** MODERATOR

## 12:00 PM PRESENTATION: STAND 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.*

**Erin McReynolds**, VP, Marketing & Client Experience, **Fremont Bank**

## 12:30 PM NETWORKING LUNCH: DELVE INTO INDUSTRY CONVERSATIONS

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## TRACK 1: BUSINESS STRATEGIES

### 1:45 PM PANEL: OMNI CHANNEL STRATEGIES

#### Omnichannel Marketing in Financial Services:

- Establish marketing strategies aligned with your company's objectives.
- How best to position your subject matter experts (SMEs) and thought leadership from your organization.
- Leveraging digital marketing approaches to complement alternative/offline marketing

**Anil Daryani**, Managing Director, Citi  
**Rich Smith**, Chief Marketing Officer,  
**Vojomo Holdings**

**LeAnita Ragland-Brooks**, Managing Director, VP, **Prudential Financial (former)**

MODERATOR

## TRACK 1: BUSINESS STRATEGIES

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

#### 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:

## TRACK 2: SOCIAL MEDIA AND CONTENT STRATEGY

### 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.

- **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 Kurmel**, Director, Channel Marketing, **Parnassus Investments**  
**Terrence True**, Terrence true, principal consultant, **Coffee creative + strategy**

MODERATOR

## TRACK 2: 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:

# AGENDA - DAY 2

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- 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.

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

**Mike Croth**, VP, Head of Digital Marketing, **Matthews Asia**

- 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**

## 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
- Meet one-on-one with leading solution providers to **discuss organizational hurdles**
- **Brainstorm solutions** and gain new perspectives and ideas

TRACK 1: INDUSTRY EXPERT

TRACK 2: INDUSTRY EXPERT

## 3:15 PM FROM BRAND AWARENESS TO ACQUISITION

**Strategic Account-Based Strategies for Quality Leads**

According to a study by Nielsen, 59% of consumers prefer to buy products from familiar brands, so brand recognition is a key piece to the buyers' journey. So how do you redirect your efforts on building brand awareness with the prospects who are the best fit for your company? Create a blueprint on:

- How to differentiate your brand across the competitor landscape
- How to build trust with prospects and your sales team in order to drive conversions and efficiency in the funnel

## 3:15 PM BETTER CUSTOMER-CENTRIC CONTENT

**Personalization Strategies for Orchestrating Engaging Omnichannel Experiences**

Customer expectations in the financial services industry have changed rapidly in recent years, and marketers are adapting their strategies to keep up. Fostering meaningful, personalized conversations and connections with your customers has become vital. This session introduces Sitecore's DX Maturity Model and highlights real-world strategies banks and insurance firms have used to accelerate customer engagement. In this session, we'll learn by:

- How to retain customers by personalizing their experiences with Account-Based Advertising (ABA) from the early stages

**Ashley Skiles**, Director, Corporate & Community, **RollWorks**

- Exploring use case examples of omnichannel personalized experiences across banking, insurance, and finance in the context of Sitecore's DX Maturity Model
- Reviewing recommendations for initiating and scaling a data-driven optimization program
- Previewing an innovative use case leveraging GenAI to draft personalized marketing messaging for various Financial Services audience segments.

**Jonathan Corley**, Director of Experience Strategy, Customer Transformation, **Sitecore**

## 3:45 PM CLOSING FIRESIDE: COMMUNITY INVOLVEMENT AS A MARKETING STRATEGY

**How Community Engagement Fosters Relationship and Business Growth**

One of the best ways to make an impact with your business is to first make an impact in your community. Master strategies to:

- Actively engage your community to grow your client base.
- Distinguish yourself from competitors, boost customer loyalty and have a happier workplace.
- Build lasting customer relationships that result in a strong referral loop.
- Foster working relationships internally to reach a greater market.

*Support the community to create an impact that is exponential.*

**Nina Webster**, SVP, **Amalgamated Bank**

**LeAnita Ragland-Brooks**, Managing Director,VP, **Prudential Financial (former)** MODERATOR

## 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.

**LeAnita Ragland-Brooks**, Managing Director,VP, **Prudential Financial (former)**

## 4:30 PM CONFERENCE CONCLUDES

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*“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



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*“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

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*“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

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

AVP, Strategy, Standard Life

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*“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



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*“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



## How to Register

### IN-PERSON PASS

**FULL TWO-DAY ACCESS:**

Take advantage of keynote sessions, panel discussions, case studies, interactive roundtables and one week of pre-event networking via our dedicated platform

**FACE-TO-FACE NETWORKING:**

Connect and build valuable relationships with our audience of thought leaders

**5-STAR TREATMENT:**

Enjoy the complimentary breakfast, lunch, and cocktail reception, all within one stunning location

**EXPO HALL:**

Form lasting business partnerships, test drive the latest solutions and gather exclusive content from industry-leading experts

**SPEAKER PRESENTATIONS:**

Take home PowerPoints and white papers addressing your biggest challenges

**ON-DEMAND ACCESS:**

Conveniently rewatch any session for up to 3 months after the event

### VIRTUAL PASS

**TWO-DAY LIVE STREAM ACCESS:**

Tune into keynote sessions, panel discussions and case studies with real-time Q&A from the comfort of your home

**VIRTUAL NETWORKING:**

Connect and build valuable relationships with our audience of thought leaders through topic message boards, interactive roundtables, and one-on-one discussions via our private messaging tool

**VIRTUAL EXPO HALL:**

Form lasting business partnerships, test drive the latest solutions and gather exclusive content from industry-leading experts

**SPEAKER PRESENTATIONS:**

Take away PowerPoints and white papers addressing your biggest challenges

**ON-DEMAND ACCESS:**

Conveniently rewatch any session for up to 3 months after the event



**Early Bird**

Expires on April 12th

**\$1195 USD**

**Early Bird**

Expires on April 12th

**\$895 USD**

**Regular Price**

**\$1,695 USD**

**Regular Price**

**\$1,395 USD**

### GROUP RATES

To check if you are eligible for a group rate, please contact:

**Sam Caskey**

Delegate Sales Executive

Email: [sam.caskey@strategyinstitute.com](mailto:sam.caskey@strategyinstitute.com)