

# SESSIONS

FEBRUARY EVENT - DIGITAL UX - 25/02/2021

FinovateFocus

Series of monthly virtual events  
CST/UTC-6 Time Zone

## February Event - Digital UX

9:00am - 11:45am

### Digital UX – FinovateFocus Connect Event

**9:00** - FinovateFocus Connect Starts - Format Introduction - [Greg Palmer](#), Finovate

**9:03** - Presentation 1 - Personalization and customization with data in the banking and payments industry - [Adam Carson](#), Point72 Ventures

**9:06** - Meeting 1

**9:09** - Presentation 2 - Earning customer trust in the digital age - [Jeremy Balkin](#), Award Winning Author

**9:12** - Meeting 2

**9:15** - Presentation 3 - Wealth Management: Compete for affluent digital-native clients - [Steven Ramirez](#), Beyond the Arc

**9:18** - Meeting 3

**9:21** - Presentation 4 - What do customers want: Meeting customer needs - [Steven Van Belleghem](#), nexxworks

**9:24** - Meeting 4

**9:27** - Presentation 5 - Chatbots, AI, and automation as platforms for revolutionizing CX - [Daniel Latimore](#), Celent

**9:30** - Meeting 5

**9:33** - Presentation 6 - APIs And Open Banking: Putting the customer in the driver's seat - [Ghela Boskovich](#), Financial Data and Technology Association

**9:36** - Meeting 6

**9:39** - Presentation 7 - Boosting CX in banking with AI: Conversation banking” and drop the “exploring back-end technology - [Pascal Hoffmann](#), Wells Fargo

**9:42** - Meeting 7

**9:45** - Presentation 8 - Customer Experience 2021: Using data to drive CX strategy, business outcomes, and flawless execution - [Brad Strothkamp](#), Wells Fargo

**9:48** - Meeting 8

**9:51** - Presentation 9 - TBD

**9:54** - Meeting 9

**9:57** - Closing Remarks – [Greg Palmer](#)

**10:00** - FinovateFocus Connect Concludes

### Digital UX – FinovateFocus Roundtable Event

**10:15** - FinovateFocus Roundtables Platform opens for networking

**10:30** - Roundtable Session 1

Choose your roundtable. Roundtables will run for 30

minutes and then repeat giving attendees the opportunity to attend 2 roundtables in total.

- Earning customer trust in the digital age
- Future of Payments – are we turning into a cashless society?
- Effective customer acquisition, engagement, and retention – the Experience Age
- Boosting CX in banking with AI – conversation banking: exploring back-end technologies
- Authentication, biometrics, and digital identity in digitized society
- Chatbots, AI, and automation as platforms for revolutionizing CX
- Personalisation and customisation with data in the banking and payments industry
- Insights into how to support financial futures for customers in a post-COVID-19 world – From financial planning to serving the financially challenged
- Customer Service NOW
- Video banking as a preferred means of customer communication
- What do customers want – meeting customer needs
- APIs And Open Banking – putting the customer in the driver's seat

**11:00** - Roundtable Session 2

Choose your roundtable. Roundtables will run for 30 minutes and then repeat giving attendees the opportunity to attend 2 roundtables in total. Choose from the list above.

**11:30** - Concluding Networking

**11:45** - FinovateFocus Roundtables Conclude

# SCHEDULE

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# SESSIONS

## MARCH EVENT - SMALL BUSINESS SURVIVAL - 31/03/2021

FinovateFocus

Series of monthly virtual events  
CST/UTC-6 Time Zone

### March Event - Small Business Survival

9:00am - 11:45am

#### Small Business Survival – FinovateFocus Connect Event

9:00 - FinovateFocus Connect Starts

9:03 - Presentation 1

9:06 - Meeting 1

9:09 - Presentation 2

9:12 - Meeting 2

9:15 - Presentation 3

9:18 - Meeting 3

9:21 - Presentation 4

9:24 - Meeting 4

9:27 - Presentation 5

9:30 - Meeting 5

9:33 - Presentation 6

9:36 - Meeting 6

9:39 - Presentation 7

9:42 - Meeting 7

9:45 - Presentation 8

9:48 - Meeting 8

9:51 - Presentation 9

9:54 - Meeting 9

9:57 - Closing Remarks

10:00 - FinovateFocus Connect Concludes

#### Small Business Survival – FinovateFocus Roundtable Event

10:15 - FinovateFocus Roundtables Platform opens for networking

10:30 - Roundtable Session 1

Choose your roundtable. Roundtables will run for 30 minutes and then repeat giving attendees the opportunity to attend 2 roundtables in total.

- Supporting SME customers – supply chain financing
- Acceleration of digital for the SME sector – major shakeup in the payments department
- Digital customer acquisition
- Open Banking as a win-win service model - lowering the cost and providing better service
- AI & automation as platforms for revolutionizing CX
- Mobile wallets as alternative payment solutions
- SMEs as the new target for cyberattacks

- Access to credit - speeding up turnaround times for lending
- Customer service now and beyond
- Standing out with buy now, pay later (BNPL)
- Making it personal – personalized customer experience
- BFM – Business Finance Management
- Sustainable SME banking

11:00 - Roundtable Session 2

Choose your roundtable. Roundtables will run for 30 minutes and then repeat giving attendees the opportunity to attend 2 roundtables in total. Choose from the list above.

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11:45 - FinovateFocus Roundtables Conclude

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