



INNOVATE

A SMART FUTURE

8th October 2024



Agenda

9:00 AM

Registration, Coffee & Pastries

9:30 AM

Opening & Welcome

Chris Hall, VP Sales, EMEA

9:40 AM

Seizing the moment: Why Now's the Time for Future-Ready Customer Conversations

Leigh Segall, CEO

Smart Communications CEO Leigh Segall presents a compelling case for organisations to embrace the urgency of preparing for the customer conversations of tomorrow. Discover why the present moment is pivotal in shaping the future of customer engagement, and understand the critical tools and strategies needed to stay ahead.

10:00 AM

Destination Innovation: Mapping the Future

Simon Tindal, CTO

Clinton Brown, SVP, Cloud Solutions

Richard Ward, Product Management Team Lead

An exclusive session led by our CTO and team, unveiling the innovative roadmap for the Conversation Cloud™. Discover the latest enhancements in SmartCOMM™, SmartIQ™, and SmartDX™ that will empower you to drive forward-thinking customer strategies with confidence and agility.

11:15 AM

Networking Break

11:30 AM

A Smart Future for Financial Services: J.P. Morgan's Tech-Driven OTC Derivative Processing

Alex Ewins, Executive Director, J.P. Morgan

Robin Moody, Global Head of Capital Markets

Explore JP Morgan's innovative approach to OTC derivative confirmation processing. By integrating SmartIQ with SmartDX, JP Morgan has enhanced workflow automation and decision-making processes. This session will cover the benefits and challenges of implementing these technologies, illustrating how they contribute to a smarter future in financial services.

12:00 PM

Top Analyst Trends: Modernizing Your Strategy for the Future

Scott Draeger, SVP Product Marketing & Industry Solutions

Join us for an exclusive session where we've distilled over 6,750 minutes of discussions with top analysts from IDC, Forrester, Celent, Omdia, Aspire, and more. Discover the key trends driving today's market, how the industry is evolving, and actionable insights to help you modernize your strategy for a future-ready approach.

12:30 PM

Networking Lunch



BREAKOUTS

Track 1: Capital Markets

1:30 PM

Unveiling the Future: New Use Cases for SmartIQ and SmartDX in Capital Markets

Sam Bell, Senior Solutions Architect

Explore innovative use cases that our clients have successfully implemented with SmartIQ and SmartDX in the Capital Markets space throughout 2024. Discover how these solutions are transforming the industry, and get a sneak peek at exciting projects planned for 2025.

2:00 PM

From Strategy to Success: SmartDX in Action at a Tier One Financial Institution

Mark Aldous, Co-Head of Global Markets & Wholesale Banking Services, Delta Capita

Mark Aldous from Delta Capita will share insights into a successful Managed Service Implementation using SmartDX. Learn how this strategic deployment has delivered significant successes and impressive ROI, offering valuable lessons for optimising your own operations.

Track 2: Next-Gen Communications

Ensuring Accessible Communications: A SmartCOMM Customer's Journey

Jenny Wallmark, Project Manager, Dina

Discover effective strategies for creating more inclusive and compliant communications, backed by practical examples and real-world insights. Discover how to navigate regulatory changes while maintaining clear and effective communication with customers.

Guidewire Customer Communications Cloud Integration Work Session | Theory, Practice, Lessons Learned

Will Murphy, VP Global Solutions Alliances, Guidewire

Ian Doyle, Consulting Manager, Guidewire

Renato Quintao, Sr. Partner Solution Architect, AWS

Collin Lampman, VP Solution Consulting

Get Future-Ready! Gain insights into how new cloud integrations allow you to deliver and innovate omnichannel customer communications across Guidewire, Smart Communications, and AWS in a rapidly evolving landscape.

Track 3: Ecosystem Modernisation

Forms that Mean Business: An Introduction to SmartIQ

Sally Schulte, Snr. Director, Product Marketing, Smart Communications

67% of consumers would abandon an interaction if the process for collecting data is too difficult, up from 53% in 2023. Learn what's driving this trend, how it impacts your communication strategy, and how SmartIQ can help you deliver seamless, data-driven communications that exceed customer expectations. Gain actionable insights and explore practical examples in this 101 session.

Unlocking Data: Schrodgers' Plan for Next-Gen Experiences with SmartCOMM & Salesforce

Chris Yeow, Head of Architecture and Software Development, Schrodgers Personal Wealth

Mike Bianchi, Sales Executive

Discover how Schrodgers Personal Wealth is leveraging the new enterprise edition Salesforce integration with SmartCOMM to unlock the full potential of their data, enabling hyper-personalized customer communications that resonate on a deeper level.



BREAKOUTS CTD.

Track 1: Capital Markets

2:30 PM

Bridging the Gap: Partnering to Simplify CDM Adoption in Securities Lending

Chris Rayner, Senior Associate – Market Infrastructure & Technology, ISLA
Tam Nguyen, Client Solutions Manager, Smart Communications
Imogen Philp, Product Director, LikeZero

Join Client Solutions Manager, Tam Nguyen, alongside Chris Rayner from the International Securities Lending Association and Imogen Philp from LikeZero, as they showcase how technology is assisting the adoption of industry initiatives like the Common Domain Model (CDM). Learn how our partnerships with ISLA and LikeZero are making it easier and faster to implement the CDM, enabling quicker realization of its benefits for the industry.

Track 2: Next-Gen Communications

LV's 20-Year Evolution: Harnessing the Power of Modern CCM with SmartCOMM

Stuart Hornblower, Enterprise Architect, LV
Joseph Page, Account Director, Smart Communications

Stuart Hornblower takes us through LV's remarkable 20-year journey in Customer Communications Management, from the early adoption of ThunderheadNOW in 2005 to the transformative migration to SmartCOMM. This session will delve into the successes achieved, the challenges encountered, and the invaluable lessons learned along the way.

Track 3: Ecosystem Modernisation

Better Together: Communicating Effectively and Efficiently Every Time

Sally Schulte, Snr. Director Product Marketing, Smart Communications
Chris Murphy, VP Product Marketing, Smart Communications

Are gaps between your corporate communications and your customers' onboarding or servicing experiences holding you back? In this session, we'll explore how SmartIQ powers some of the most sophisticated, mission-critical processes for insurers and banks. Whether integrated with SmartCOMM or used independently for upstream or downstream data collection, SmartIQ is a strategic tool that helps companies advance their customer communication goals with greater efficiency and precision.

3:00 PM

Networking Break

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3:15 PM

Innovation in Action: How Lloyds Banking Group Streamlined Complaints Management with SmartCOMM

Megan Hughes, Product Owner, Lloyds Banking Group
James McCulloch, Solution Architect, Lloyds Banking Group

Discover how Lloyds Banking Group transformed its complaints correspondence process, moving from legacy systems to a state-of-the-art solution with SmartCOMM. This session will explore the business benefits driving the transformation, the challenges overcome along the way, and the importance of staying compliant with platform accessibility standards. Gain insights into their journey and learn how innovation and collaboration can lead to significant improvements in customer experience and operational efficiency.

3:45 PM

The Future and What to Do About it

Mark Stevenson, Keynote Speaker, Futurist & Author

Take a whistle stop tour of The Good, The Bad and The Ugly of the next 20 years and why 'business as usual' is a recipe for disaster. How is the landscape of society going to change in terms of technology, energy, governance, health and commerce? What questions should smart organisations be asking themselves? And how can your organisation be fit for the future? Mark will show you. We're in for a rocky ride, but future-literate organisations have a shot at greatness.

4:30 PM – 6:00 PM

Raise a Glass to the Future!

After a day of insightful sessions and dynamic discussions, unwind and connect with fellow Innovate attendees. Enjoy a selection of beverages and hors d'oeuvres while reflecting on the day's key takeaways and forging new professional relationships. Celebrate innovation and the promise of a smarter future as we close out Innovate 2024 in style.

We look forward to raising a glass with you!