

TRENDS IN MARKETING OF FINANCIAL SERVICES

Day 1: COMMUNICATION AND CLIENTS		Day 2: BRANDING AND SALES	
0900-0930	Welcome, Introduction and Warmup	0900-0930	Refreshing Day One and Warmup
0930-1015	1. New Strategies <ul style="list-style-type: none"> • Bricks and Mortar vs Digital: Bricks to clicks vs Clicks to bricks • ATL vs Social Media: Synergies and Segmentation • Bundling vs Unbundling: Generalists vs Specialists • Local vs Location Independent: The digital panacea • Physical Safety vs Digital Safety: Changing client-perceptions • Case Studies: Behaviosec from Stockholm, Halifax Bank from Leeds, OCBC Bank from Singapore 	0930-1045	5. Design and Data in Digital Marketing <ul style="list-style-type: none"> • Loving a Bank: UX (User Experience), UI (User Interface) • Design as Differentiator: Branch, Website, Mobile, Logo, Brand • Big Data: Social Media Credit Scoring, Spending patterns, OCR analysis, Geographic proximity, Tailor-made recommendations, Peer comparison • Premium Segments: Luxury Brand by design and data, roboadvisors • Case Studies: Friendly Score from London, Singular Intelligence from Oxford
1015-1200	2. Communication in the Digital Age <ul style="list-style-type: none"> • Trust-building via Digital Channels: Information-cascades, Innovation-communication, Frictionless solutions • The Banking Innovation Paradox: How would Steve Jobs market a bank? • Unconventional Marketing: Gamification, Advertainment, Infotainment, Inbound Marketing, Native Advertising • Case Studies: Moven from New York 	1045-1200	6. Sales in the New Era: Maximizing Efficiency <ul style="list-style-type: none"> • Prospects: lead generation in the digital age, the Curiosity Gap • Marketing Automation: Marketing Technology, The MarTech Revolution • Video: problem or solution • Old Techniques in the New Era: Onboarding, X-Sell, Upsell, Referral, Welcome Gift, Aggregators • Case Studies: ICICI Bank from Mumbai, Umpqua Bank from Portland
1200-1300	Lunch	1200-1300	Lunch
1300-1500	3. How to React to Competition? <ul style="list-style-type: none"> • The Speed has Changed: The Red Queen Effect • Competition versus Cooperation: Coopetition, Frenemies, Co-marketing, communication through FinTech companies • Eating the Dinner of Banks: FinTech, Challenger Banks, Digital Convergence, Large Banks vs Small Banks • Risks: bad and ugly in digital marketing, security, digital alienation, financial illiteracy, regulatory approach • Case Studies: Innovate Finance from London, the Super Charger Alliance from Hong Kong, the R3 Alliance from New York 	1300-1500	7. The New Role of a Financial Brand in the 21st Century <ul style="list-style-type: none"> • Brand Personality: digital brand-personality, the digital story of the brand • CSR: 'the good bank', how a bank can turn the tide on stereotypes • PR 2.0: new opportunities in public relations • Value Proposition: innovative image, good employer, awards, getting beyond the six basics of value proposition (value for money, one-stop shop, superior expertise, product-differentiation, ethics, innovative edge) • Case Studies: PayPal from Palo Alto, TransferWise from London, LendingClub from San Francisco, BBVA from Madrid
1500-1700	4. Clients of the New Millennium <ul style="list-style-type: none"> • Contradictions: Millennials vs Baby Boomers, Mass vs Affluent • Linear vs Exponential: Metcalfe's Law, old media vs new media • Customer Loyalty: the lock-in effect • Digital Identity: the trillion dollar problem • Segmentation: CRM, profiling, customer analytics • Case Studies: Max My Interest from New York, Stockpile from Palo Alto, Tether from Hong Kong 	1500-1700	8. Summary <ul style="list-style-type: none"> • Concepts • Tools • Trends • 'To-Do's • Resources Evaluation and Termination of the Seminar



Trainer: Mr David Gyori

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