

13th Annual

# Digital Marketing *for* Financial Services Summit

CANADA

June 6 & June 7, 2023

Hyatt Regency Hotel Toronto  
Toronto, Ontario

**THE ONLY EVENT  
DEDICATED TO  
BEST-IN-CLASS  
DIGITAL MARKETING  
TACTICS FOR  
THE FINANCIAL  
SERVICES INDUSTRY**



# New for 2023



We offer a unique immersive format that includes:



**Workshops**



**Roundtables**



**Speed Networking**

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



# Who Attends?



# AGENDA - DAY 1

Tuesday, June 6th, 2023

## 7:45 AM NETWORKING BREAKFAST: BUILD COMMUNITY CONTACTS

- Start your day off right and connect with **digital marketing leaders** from the financial services sector.
- 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 KEYNOTE FIRESIDE CHAT: MARKETING TO AN OMNICHANNEL 'ALWAYS-ON' CUSTOMER

A great omnichannel experience is what customers want now to become loyal customers. Not only do they want personalized website content, relatable social media posts and multiple touchpoints, but they expect it. How do you achieve this from a financial services perspective? What extra real-time and added features are the 'ultimate deciding factor' to win loyal customers and future fans? Develop a robust, flexible, and future-facing blueprint to:

- Identify the value 'adds' that make a difference: in-app chats, email support, contact centre calls, or chatbot to interact with customer support teams in real-time
- Pinpoint and bridge the gaps in customer journeys and nurture them with custom digital marketing solutions
- Use email and social media across channels to connect diverse audiences in their preferred way

*Start a meaningful omnichannel conversation to build long-term, loyal customer relationships.*

## 9:30 AM CMO GAMECHANGERS PANEL: CUTTING-EDGE DIGITAL CUSTOMER ACQUISITION

### Advance Digital Innovation to Power Digital Customer Acquisition

Customer acquisition is a journey, not a destination. Its importance, however, has been gathering momentum and is vital in the post-COVID financial services (FS) world. Recognize what customer acquisition success looks like for your FS business and how to avoid the failures and missed opportunities that are all too common within digital customer acquisition best practice. Create a roadmap to:

- Maximize the tech that you already have for better acquisition
- Reengineer, upskill and prepare your workforce for the future of new digital customer services and products
- Enable digital customers to find and adopt your products quickly, efficiently, and seamlessly across channels

*Identify your best acquisition approaches to accelerate your growth and stay ahead of the competition.*

## 10:00 AM INDUSTRY EXPERT: THE POWER DUO

### The Power 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 in order to maximize the overall digital shelf space. Hear what it means to:

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

Join us today on this hot topic that leads discussions around integrated search

## 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 leaders** and gain invaluable support.

## 11:00 AM EXHIBITOR LOUNGE: VISIT BOOTHS & SOURCE EXPERTISE

- Explore the latest digital marketing strategies with our financial service industry leaders
- Share your challenges with the biggest innovators in the business.
- Schedule one-to-one private meetings for personalized advice.

# AGENDA - DAY 1

Tuesday, June 6th, 2023

## 11:15 AM INDUSTRY EXPERT: EXCEEDING EXPECTATIONS FROM THE VOICE OF THE CONSUMER FEEDBACK

### How To Turn Customer Reviews and Into a Positive and Transformational Driver of Business Revenue

Reviews and ratings have become the single most influential factor in making a purchase decision according to 98% of consumers, surpassing price and personal recommendations. But engaging with audiences in regulated industries like financial services is particularly challenging. In this session, we will explore:

- Responding to reviews in a way that turns negatives into positives and into advocates for your brand
- How to build volume and quality of positive reviews authentically and efficiently
- Measuring the impact of reputation management on the business
- How to you build a review moderation team and strategy

*Essential lessons from leading brands: transformational results by actively managing their online reputation*

## 11:45 AM CMO POWER PANEL: SOCIAL MEDIA'S BIGGEST OPPORTUNITIES FOR DIGITAL MARKETERS

Social media marketing is only one aspect of digital marketing, but as today's world has become increasingly social, it's one in which financial services are gaining traction and ground through innovative campaigns across Facebook, Twitter, Instagram, YouTube, Goggle+, Snapchat, TikTok, etc. Achieve the optimum combination of digital marketing services to reach more people at once by leveraging the power of social media, search engines, and other online channels. Master the success factors to

- Gain customer advantage through creative ways to approach new platforms
- Gauge whether a new platform is worth exploring
- Avoid generic social media tactics and better harness engagement polls, recurring series, searching for, and engaging with, social mentions
- Use short-form video where it makes sense for your brand (TikTok, Reels, YouTube Shorts)

*Improve your community management to strengthen brand awareness and connections with diverse audiences*

## 12:15 AM INDUSTRY EXPERT: ROI

### Spending Your Money in the Right Digital Time and Place

Now more than ever, with COVID-19 as a catalyst, financial marketers are challenged to build strong bonds between their brands and consumers amidst persistent industry trends of virtualization and personalization. Optimize your digital advertising, media and creative spend to strengthen brand equity and drive conversion. Adopt best practices to:

- Build a holistic, compelling customer experience across channels and creatives
- Balance brand-building with conversion across your advertising portfolio
- Adapt your marketing strategy with the changes in media consumption during COVID-19

*Transform the customer relationship via advertising to improve brand equity and engagement.*

## 12:45 PM NETWORKING LUNCH: DELVE INTO INDUSTRY CONVERSATIONS

- Meet interesting speakers and receive advice on the **latest financial services industry issues** and trends.
- **Expand your network** and make connections that last beyond the conference.
- Enjoy great food and service while engaging with your **digital marketing colleagues**.

## 1:45 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.

# AGENDA - DAY 1

Tuesday, June 6th, 2023

## TRACK 1: INTERNAL CONTENT & BRANDING

## TRACK 2: AUTOMATION

**2:00 PM** Increase Customer Engagement via Employee Brand Advocacy with New Content Tools

**2:00 PM** Make Your Digital Marketing Budget Go Further Via Automation: Extending Your Digital Reach

As social media and content overload has become a more integrated part of our lives, find out how to gear up your internal team communication strategies to achieve greater recognition for your brand and ultimately financial products and services. Source practical tips to:

- Engage and retain employees with fresh content: Does ChatGPT have a part of play?
- Pinpointing the key challenges of employees who shy away from being a part of employee advocacy programmes, because of the pressure to generate content online
- Captivate engagement with a streamlined internal posts, newsletters, videos and podcasts which support a wider digital marketing strategy where content and tone of voice reflects your customer base

*Amplify your marketing teams engagement to nurture, inform and mirror your financial customers base*

Automation is a powerful tool when used correctly. It can have a big impact on the success of your promotional campaigns and digital marketing efforts. In an uncertain economy and with inflation skyrocketing, many companies are rethinking their marketing budgets and trying to determine the best ways to be profitable. Master the success factors to

- Deliver intelligent and agile AI and machine learning services which positively shape the customer experience
- Engage with key internal stakeholders to increase automation adoption and mitigate barriers to use
- Develop a new digital ecosystem that responds to both business needs and regulatory frameworks to create pivotal and innovative digital marketing capabilities

*Optimize your automated digital marketing tools to ensure maximum ROI.*

## TRACK 1: EMAIL MARKETING

## TRACK 2: ROI

**2:30 PM** Panel Discussion: DEFINING A MORE EFFECTIVE EMAIL MARKETING STRATEGY

**2:30 PM** Panel Discussion: MONETIZING BEHAVIOURAL ANALYSIS

**Nurturing Best Practices That Work for Mobile, Online and Across Social Media**

Email is more than the workhorse of digital marketing – it's an amazing channel that often delivers the best results for marketers. Evaluate campaigns that drive measurable ROI and results, and successfully harness these ideas with your team.

Take back to your office strategies to:

- Assess the internal and external factors that may be affecting your email performance
- Segment, target, and position your next email campaign effectively
- Establish clearer email KPIs: measuring and monitoring for continual improvement

*Develop a robust email strategy blueprint to reach diverse audiences and drive revenue.*

**How Successful Financial Firms Are Using Digital Behaviour Analysis in Acquisition Strategies**

Find out how digital analytics coupled with user research are the cornerstones of behaviour insights and better decision-making for future digital growth and planning. Listening and adapting your marketing and product strategies to meet customer demands can be forged by understanding behaviour and identifying patterns to predict your customer's journey. Walk away with an action plan to:

- Pinpoint the use of feedback: the difference between measuring and acting on behavioural insights
- Track behaviour using behavioural KPIs and digital dashboards/ analytics
- Use new digital tools to understand behaviour across different channels and predict customer habits

*Forecast digital financial services adoption and customer behaviour for growth and innovation.*

# AGENDA - DAY 1

Tuesday, June 6th, 2023

## TRACK 1: LEAD GENERATION & SEO

### 3:00 PM Rethinking How to Deliver a Safer, Richer and More Engaging Web Experience

Customers today are influenced by the financial services brands that are most relevant, convenient, and immediate in the delivery of everything from products to customer service. To compete, FS professionals must create stickier and more streamlined websites. Develop better websites, content, and design to fit in a world where no two customers have the same preferences and expectations. Master the success factors to:

- Navigate mobile first design: Grasp new possibilities for more innovative website and m-commerce capabilities
- Design a website which complies with customer privacy regulations in financial services
- Build better contextual content/experiences that become a lead generator for your brand

***Build future-proof website strategies to enhance your brand positioning for the new digital era.***

## TRACK 2: SMART TOOLS

### 3:00 PM Optimize Your Self-Service Customer Experience: Proactive, Seamless, Intelligent

The development of digital technologies has brought heightened customer expectations. Seamlessly support your customers to embrace a digital self-service path. Achieve a step-by-step action plan to:

- Strike the balance between digital & human: Managing sensitive, critical & complex interactions
- Become a one-stop-shop for your customers' needs: Determine the self-service platform strategies that are best suited for your services
- Manage and integrate digital self-service interfaces for a heightened customer experience

***Master self-service and user-friendly technologies to deliver greater customer satisfaction and boost your brand's reputation.***

### 3:30 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.

### 4:00 PM INDUSTRY EXPERT: DIGITAL TRANSFORMATION: ILLUMINATING YOUR BRAND'S COMPETITIVE EDGE

#### Aligning Your Digital Journey to Match an Existing Reputation and Competitive Edge

To illuminate its legacy process and intellectual rigor, Acadian worked with Verndale to maximize website design, user experience, and performance on Sitecore and apply digital marketing enhancements. Join Stacey Summers, SVP, Director of External Communications at Acadian Asset Management, as she discusses Acadian's digital transformation and optimization. Create a roadmap to:

- Gain organizational buy-in, prepare for potential challenges, and convey ROI
- Implement a strategic approach, agency partnership, and the right technology
- Drive immediate positive results and the benefits of continual optimization

***Start your digital journey transformation with organizational buy-in, cross-functional strategy, and agency partnerships to gain a competitive edge and immediate results.***

# AGENDA - DAY 1

**Tuesday, June 6th, 2023**

## **4:30 PM CLOSING POWER PANEL DISCUSSION: TURNING CUSTOMERS INTO LIFELONG BRAND ADVOCATES**

### **Building More Personalized Experiences Using Digital Customer Feedback, Data, and Insights**

Consumers are likely to act on their behaviours formed during the pandemic and financial institutions have a duty to ensure that their employees can help make those customer transitions as smoothly as possible. In this practical discussion, find out how to build digital marketing best practices by recognizing that employees are consumers too, so what better way to gain insights than from those on the ground. Take away specific solutions to:

- Amplify great employee experiences that translate to better customer experiences
- Integrate effective strategies for remote working and the digital marketing revolution
- Define the customer experience in a future where financial wellbeing is prioritized

*Determine where to put your efforts to prepare for a digitally disrupted and empowered FS marketing world.*

## **5:00 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!

## **5:10 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 Toronto nightlife has to offer. Just be sure to set your alarm for Day 2!

## **6:10 PM DAY 1 CONFERENCE ADJOURNS**



# AGENDA - DAY 2

Wednesday, June 7th, 2023

## 7:30 AM NETWORKING BREAKFAST: BUILD COMMUNITY CONTACTS

- Start your day off right and connect with **digital marketing leaders** from the financial services sector.
- 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 FIRESIDE CHAT/DISCUSSION KEYNOTE: NEXT GENERATION FINANCIAL SERVICES: ACQUIRE - DELIGHT - ENGAGE

### Ensure Your Future Digital Marketing Strategy & Technology are Robust Enough for the Next 5 Years

The evolution of Open Banking and opening data and services to third-parties is strongly linked to growth and innovation. As this new era in collaboration hits Canada and the US, FS organizations have no choice but to take digital transformation seriously and prioritize it. Accelerate your transformation journey and be the leader in digital-first engagements by going beyond the norm and creating rewarding, innovative partnerships. Harness digital capabilities with leading-edge digital tools that are designed and centered on the customer. Develop a blueprint to:

- Break free from the boundaries of legacy technology and systems, embrace new ways of thinking, and strengthen relationships with customers
- Integrate enterprise and digital marketing platforms: The emerging role of open finance/banking and collaboration
- Align digital marketing to overall organizational transformation to better meet the needs of an emerging financial services landscape
- Identify the critical measures, tools, and technologies to support you on your new digital journey

*Take a deep dive into evolving your technology, platforms, and transformation journey to stay ahead of, and embrace, digital disruption.*

## 9:30 AM CMO POWER PANEL: AI AND DATA ANALYTICS

### Successfully Translate Data into Actionable Insights for Personalized, Targeted & Compliant Digital Marketing

2023 will be the year of advanced data analytics. Data is the must-have fuel powering today's modern financial marketing initiatives and overall business decision making. During economic uncertainty, smart, data-driven FS organizations are asking how they can make better decisions by investing in data as a strategic asset. Walk away with an action plan to:

- Achieve well-tailored, data-driven customer journeys with effective data capturing strategies which unlock meaningful insights, streamline transformation, and support digital change
- Recognize how data strategies are evolving, what predictive and prescriptive analytics look like in 2023 and beyond, and how other financial services organizations are targeting and managing their data principles
- Guarantee boosted consumer trust and loyalty by establishing safe and secure digital channels and proven data security strategies

*Action data insights to provide accurate customer segments and deliver tailored digital experiences.*

## 10:00 AM INDUSTRY EXPERT: LAUNCHING A NEW DIGITAL EXPERIENCE

### Ready, Set, Digital: Accelerating New Consumer Engagement for FS Organizations

Take away specific solutions to:

- Meet new customer demands for financial services and collaborate to support faster growth
- Strengthen your technical foundation and recognize who owns what in a digital partnership
- Assess the role of personalization in meeting customer needs: How can digital loyalty enable working together?
- Identify the emerging customer demands for FinServ through partnering with a Fintech

*Optimize your digital team strategy to fast-track customer loyalty and engagement with your products and services.*

# AGENDA - DAY 2

Wednesday, June 7th, 2023

## 10:30 AM EXHIBITOR LOUNGE: VISIT BOOTHS & SOURCE EXPERTISE

- Explore the latest **digital marketing strategies** with our financial services industry leading sponsors.
- Share your challenges with the **biggest innovators** in the business.
- Schedule **one-to-one private meetings** for personalized advice.

### TRACK 1: CONTENT

### TRACK 2: DIGITAL TOOLS

## 11:00 AM PANEL TRACK

### Delivering Powerful Changes in Digital by Building Better Content Marketing

As more brands invest in digital content, the quick wins they need have become harder to achieve. To stand out from the crowd, the most successful financial brands are investing in longer content with higher production values. Transform your digital marketing team's production of reading experiences and content engagement for their leads. Adopt best practices to:

- Embrace immersive digital storytelling & experts for your content marketing
- Get started: the merits of content hubs vs digital platforms
- Build digital impact without blowing your budget
- Back your content with research and generating sales – not just clicks

*Steer your digital content and creative storytelling strategically to transform your content marketing impact.*

## 11:00 AM PANEL

### How to Harness New Chatbot Technology to Boost CX Engagement

AI continues to grow to be an essential tool for digital marketers who wish to provide hyper-personalized, exceptional CX. Connect the dots with AI to create exceptional digital customer experience. Source practical tips to:

- Identify what today's customer expects from their dedicated, personalized online experience
- Gain internal buy-in for new technology, skill development and full suite integration
- Unlock new digital opportunities to design richer, more immersive, and personalized customer experiences
- Develop robust digital engagement strategies that encourage positive engagement for meaningful, long-term relationships

*Advance your AI and machine learning capability to build a more accurate understanding of customer needs.*

### TRACK 1: CONTENT

### TRACK 2: EMPLOYEE ENGAGEMENT

## 11:30 AM INDUSTRY EXPERT

### The Power of Effective Content Technology: Systems, Features and Best Practice

We have reached a point where disappointment is common in web projects. We set up unrealistic expectations and timeframes and often concentrate purely on big launches and redesigns. However, truly effective website ROI lies in incrementalism — small changes, made over time, with the help of effective content technology, toward a logical overall goal. Take back to your office strategies to:

- Integrate key tools and actions to prevent poor and ineffective content
- Examine customer, peer, and managerial perspectives
- Enable and integrate technology to enhance and segment

*Perfect how you manage content and implement technological changes to increase user-friendliness and engagement.*

## 11:30 AM INDUSTRY EXPERT

### DRIVING INTERNAL DIGITAL CULTURE CHANGE: Employee Experience to Improve Employee Satisfaction and your Bottom Line

Rethink the employee experience amongst huge changes and challenges ahead from remote working to improving how we work can all support more effective digital marketing. Drive your company's digital and customer improvements to the next level with tips from one of Canada's Top 100 Employers. Take away specific solutions to:

- Harness positive results by blending digital transformation with employee engagement and experience
- Use digital journey-mapping that will help you create effective digital experiences
- Assess how both types of programs can improve internal communication and co-operation

*Recognize the key links between digital experience and employee experience to improve your bottom line.*

## 12:00 PM NETWORKING LUNCH: DELVE INTO INDUSTRY CONVERSATIONS

- Meet interesting speakers and pick their brains on the **latest financial services 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.**

# AGENDA - DAY 2

Wednesday, June 7th, 2023

## 1:00 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.

## 1:15 PM ROUNDTABLES: SHARE & DISCOVER THOUGHT-PROVOKING IDEAS

These informal peer-to-peer discussions are the perfect opportunity for you to gain further practical insights, brainstorm and discuss some of the most pressing issues affecting your role. Discussions will run concurrently for 30 minutes. Following the discussion, each table will share their top 3 practical take aways. Topics will include:

- ChatGPT: Harnessing Generative AI to make better digital marketing decisions
- Regulatory challenges and changes needed for digital marketers in FS
- Stretching your digital budget: How to do more with less money
- Moving from Web2 to Web3: Bitcoin and blockchain
- Using Influencers and Building B2C Communities
- Scaling Your Social Media Strategy

## 2:00 PM INDUSTRY EXPERT: REAL-TIME ROI DECISIONS

### Increase Revenue, Reduce Churn, And Drive Long-Term Loyalty: Adding Value During Every Interaction

The future of marketing is real-time engagement, but there are many challenges and misconceptions about what that really is and how to do it well. Discover how to make faster decisions and adapt the experience in milliseconds. If not, you're missing the mark. Master the success factors to:

- Pivot between selling, serving, and retaining in real-time based on each customer's current needs
- Optimize experiences across inbound, outbound, and paid channels with contextual next best actions
- Increase revenue, reduce churn, and drive long-term loyalty by constantly adding value during every interaction

*Implement practical frameworks and models to identify and fix cracks in your digital customer experience.*

## 2:30 PM CASE STUDY: WHY BAAS IS TRANSFORMING THE FINANCIAL SERVICES SPACE

### Enabling the Liberation of Financial Services: Blurring the Lines Between Non-Regulated and Regulated Services and Their Digital Marketing

Banking as a Service (BaaS) has become one of the most important strategic agenda items for chief executives across numerous industries including banking, retail, construction, insurance, and healthcare. BaaS enables any business to develop new and exciting propositions with relevant financial services embedded into the customer experience. Identify who will be the winners in BaaS – and how to make sure you are one of them. Adopt best practices to:

- Map the market: pioneers and early adopters are embedding their products and services into other platforms
- Integrate public cloud technology and light touch regulatory structures: Harness new digital platforms to achieve economic scale
- Develop non-financial brand partnerships: Forge exciting new products and customer experiences
- Buy now, pay later and cryptocurrencies: richer data collection and customer relationships

*Reach a greater number of financial services customers at a lower cost to enhance digital efficiency and customer satisfaction.*

## 3:00 PM MARTECH POWER PANEL: WHERE TO INVEST BUDGET INTO FUTURE FINANCIAL SERVICES TECHNOLOGY

### Cost-Saving IT: Tools and Tactics Across All Digital Marketing Levels

We are at the cutting edge of new disruptive trends and now is the time to plan future scenarios for fresh, innovative product development and distribution. Build an effective digital marketing offering in the next decade with the top 10 ideas to boost innovation after the crisis. Source your plan of action with:

- Setting up an integrated, cross-functional command centre
- Responding to diverse demand curves across call centres vs branch enquiries
- Adjusting your brand campaigns, sharing strategies and tactics with your key teams across the business
- Winning budget and measuring/demonstrating ROI for transformation

*Harness software and IT investments to optimize an always on, 24/7 digitally robust marketing strategy.*

## AGENDA - DAY 2

Wednesday, June 7th, 2023

### 3:30 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.

### 4:00 PM PANEL DISCUSSION: FINANCIAL SERVICES BEYOND PROFITS

#### Radically Challenge Your Organization, Ethos and Business Mission: Accelerated Transformation with Purpose at the Heart

Transformation is now about digitization and monetization with purpose, often leading to sustainability taking a reluctant 'back seat.' Standing out in a crowded financial services market in a modern world is about creating a differentiated value proposition - one grounded in purpose - for employees, customers, and partners. Develop a blueprint to:

- Re-evaluate, re-shape and re-think how your business is done
- Identify a how to design a new business proposition that does good
- Create a sustainable, purpose-first mentality, and develop strategies that work for business and society.
- Make a new impact on individuals and communities.

*Bolster your sustainable digital transformation to create positive impact in your financial services community.*

### 4:30 PM CLOSING PANEL SESSION: METAVERSE & THE DIGITAL VS. HUMAN TOUCH: IS AI YOUR BEST NEW TEAM MEMBER?

#### Maintain The Balance Between Human Touchpoints & Digital Technologies to Reflect Customer Needs

The choices financial services organizations make next will impact the world and its structure in more ways than we can imagine, and it all points to shifts in people's relationships. Achieve a step-by-step action plan to:

- Respond to changes in customer behaviours to execute a more value-driven, relevant experience
- Balance the demand for hybrid, omni-channel experiences which intuitively directs between digital and human interactions
- Leverage crucial insights into data and customer behaviour to tailor CX strategies more effectively to customer needs

*Improve customer engagement with your company beyond a "one-size-fits-all" approach to align with individual needs and increase satisfaction.*

### 5:00 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.

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**Digital Marketing** for  
**Financial Services**  
**Summit** CANADA

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*“Encouraging to see innovative and creative ways to solve the issues, constraints and challenges in a highly regulated industry. It’s nice to get out of your comfortable home environment to meet peers face to face, who have new and inspiring ideas.”*

Bank of America



“

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

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.”*

Lincoln Financial Group

“

*“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.”*

State Street Global Advisors



“

*“The content and speakers exceed my expectations!”*

Oxford Financial Group

“

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

Standard Life

13th Annual

# Digital Marketing *for* Financial Services Summit **CANADA**

June 6 & June 7, 2023  
Hyatt Regency Hotel Toronto  
Toronto, Ontario

## 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



**REGISTER  
NOW**

**Early bird**  
expires on May 5th

**\$1,795 CAD**

**Regular Ticket**

**\$2,295 CAD**

**Early bird**  
expires on May 5th

**\$1,395 CAD**

**Regular Ticket**

**\$1,695 CAD**

### VENDORS/ SUPPLIERS/ CONSULTANTS

Add value and showcase your expertise to decision-makers looking to invest in impactful solutions. Reach out for more information with a 24-hour turnaround! Contact:

**Darren Haughian,**  
Sponsorship Manager  
T: 1-866-298-9343 ext. 276  
E: darren@strategyinstitute.com

### GROUP RATES

To be eligible for group rates, delegates **MUST** register at the same time. The total discount per delegate (including applicable group discounts, etc.) **MUST** not exceed 25% of the regular conference cost.

For more information and to book your group passes, contact

**Sam Caskey,**  
Delegate Registration Manager  
E: sam.caskey@strategyinstitute.com

