

Programme Overview

10-12 November 2015

Topic Tuesday 10 November	Speaker Tuesday 10 November
<p>1600-1630</p> <p>Welcome / Opening Remarks</p> <p>Giving Context to the Digital Academy- Expectations, Goals, & Takeaways.</p> <p>Duration: 30 Minutes</p>	<p>Jitin Goyal <i>CEO, Polaris</i></p> <p>Jitin is the Chief Executive Officer & Executive Director – Polaris Consulting & Services Ltd. He has 20 years of executive experience in banking, with senior positions at Infosys and Citi.</p> <p>Theodore Malloch Senior Fellow, Saïd Business School, Digital Academy Program Director Ted is a Fellow in Management Practice at the Saïd Business School. He has served on the executive board of the World Economic Forum (DAVOS), and has held an ambassadorial level position at the United Nations. Ted is a Board member of Polaris.</p>
<p>1630-1800</p> <p>Digital Banking – The State of Play Today</p> <p>The opening session will provide insights into the key trends and the most pertinent issues currently facing the financial services industry today.</p> <p>ATKearney will present an executive summary of their research on digital banking, conducted in association with the Efma. The presentation will demystify where the industry is on the transformation spectrum, separating the reality from the hype, and providing insights into what the banking landscape will look like over the next 3-5 years.</p> <p>Facilitated round table discussion to follow.</p> <p>Duration: 90 Minutes</p>	<p>Stefan Marcu <i>Principal, Europe, Middle East and Africa, A.T. Kearney.</i></p> <p>Stefan Marcu is a principal in A.T. Kearney's Financial Institutions practice and managing director of the Bucharest office. He has worked extensively in Europe consulting on post-merger integrations; corporate restructuring and re-engineering; organisational design and implementation; and cost-reduction programmes. He has contributed to publishing a series of studies on the topic of digital banking and has collaborated with Efma on various workshops and conferences. He is the author of "Banking in a Digital World" and "Going Digital: The Banking Transformation Roadmap".</p>
<p>Walking tour of Oxford followed by welcome dinner at Rhodes House</p> <p>Take in the historic and unique architecture of Oxford at a special welcome dinner in the famous College dining room. Andrew White will make a short welcome speech.</p>	<p>Andrew White <i>Associate Dean for Executive Education, Saïd Business School</i></p> <p>As an experienced programme director, teacher and researcher, Andrew's areas of expertise include innovation management and leadership development.</p>
Topic Wednesday 11 November	Speaker Wednesday 11 November
<p>0900-1000</p> <p>Digital Maturity Model – Introduction to the Framework for Benchmarking and Transformation</p> <p>The Digital Maturity Model (DMM) provides over 100 measurements that assess your organisation's readiness for digital transformation. During the course of the workshop, the facilitators will leverage the DMM and associated framework to enable you to measure your "AS-IS" state along critical dimensions, form a strategy, define priorities, and create a deployment plan for you and your organisation.</p> <p>The model is an important part of the pre-conference preparation, and will be used in each learning module. The model, combined with the lessons learned from the faculty and industry leaders, will provide you with the insights needed to return to your organisation with a clear understanding of how to address the challenges you face.</p> <p>Facilitated peer-to-peer learning exercise to follow.</p> <p>Duration: 60 Minutes</p>	<p>Sanjay Vatsa <i>Chief Strategy Officer, Polaris</i></p> <p>Sanjay has significant experience in operational excellence, transformation, risk, and compliance. Sanjay is a co-creator of the Digital Maturity Model and is credited with creating other maturity models that have received wide industry acceptance.</p>

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1000-1030 Break

1030-1200

Module 1

Digital 360 Out – New Connections to Your Ecosystem - Immersive Design Session

Entire industries are transforming their operations and reducing their cost by pushing more of their process out to the end user through an omni-channel strategy. And end users are delighted to have more control and better service in the self-service economy.

This session will cover best practices, case studies, and industry benchmarks. It will also include facilitated round table discussions and a self-assessment along key dimensions in the Digital Outside section of the DMM.

Duration: 90 Minutes

JP Jolly

Global Head of Channel & Enterprise Services Treasury & Trade Solutions, Citi

J.P. is responsible for Citi's award-winning cash management and trade services platforms across 104 countries; manages Citi's core Channel Services solutions, including CitiConnect® and CitiDirect® Online Banking, and responsible for global enterprise platforms including Account Services, Billing, Analytics, Data Management and mobile solutions.

1200-1300 Lunch

1300-1430

Module 2

Digital In – Beneath the Surface of the Iceberg – Immersive Design Session

To achieve operational excellence on your way to true digital transformation, processes need to be redesigned, databases need to be connected; systems need to be modernised and migrated. Little attention is paid to this complex hard work that is necessary to provide the end user results.

This session will cover best practices, case studies, and industry benchmarks. It will also include a facilitated round table discussions and a self-assessment along key dimensions in the Digital Inside section of the DMM.

Duration: 90 Minutes

Michael Harte

Chief Operations & Technology Officer, Barclays Bank

As an advocate of open systems, standardised and lean processes, Michael is always looking at applicable technologies and services to meet the opportunities and challenges that lie ahead for customers and the finance industry. He has a wealth of experience in business strategy and driving world-class operational and service excellence.

1430-1500 - Break

1500-1630

Module 3

Big Data & Analytics – Insightful Engagement -Immersive Design Session

Big Data, machine learning, analytical tools and other technologies have come together to enable high touch, highly automated, context sensitive and highly personalised customer insights.

This session will cover best practices, case studies, and industry benchmarks. It will also include a facilitated round table discussion.

Duration: 90 Minutes

Janet Smart

Reader, Saïd Business School

Janet Smart is Professor in Operations Management at Saïd Business School. Her areas of expertise include systems engineering, complex systems, big science projects, and programme management.

Janet's research and teaching are in the design, delivery and management of large, complex systems. She has been applying her knowledge to the development of new data gathering and modeling tools that will lead to new models of economics and social sciences.

1630-1715

Outside the Box - Digital Transformation at CNBC

CNBC, a global leaders in business news, went through a complete digital transformation in order to stream up-to-the minute news in an ever expanding global omni-channel environment. This pervasive transformation affected all aspects of their operations and enabled them to maintain their leadership in a white-hot competitive marketplace.

Duration: 45 Minutes

Steven Fastook

Senior Vice President of Operations, CNBC.

Steve is responsible for production and operations of the CNBC network. In this role he has advanced the use of technology and launched the first ever totally digital process at CNBC, seen as a benchmark in the industry. Steve is the recipient of 9 Emmy Awards for his work on the Olympics and other shows.

Ashmolean Museum Tour and Dinner at Browns Restaurant

Relax and enjoy an exclusive Exhibition and talk, followed by a drinks reception and dinner

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<p>0830-930</p> <p>Module 4</p> <p>Cyber Security: Innovative Solutions to Address Security Threats - Immersive Design Session: Case Studies & Design Frameworks</p> <p>This session will focus on cyber security, the progress of cyber security methodologies and technologies and the wider consequences of the changing role of security in a digital age.</p> <p>This session will cover best practices, case studies, and industry benchmarks. It will also include a facilitated round table discussion followed by an organisational self-assessment along key dimensions in the security readiness section of the DMM.</p> <p>Duration: 60 Minutes</p>	<p>David Upton <i>Professor, Saïd Business School</i></p> <p>David Upton is a leading expert on the integration of information technology and operations management to provide competitive advantage. David is currently working on an Oxford-led multi-university collaboration, funded by the Centre for the Protection of the National Infrastructure. This work looks at the risks of insider cyber-attack, focusing on prevention, detection and education concerning this growing hazard for companies and their boards.</p> <p>Rajini Anachi <i>CEO mZeal Communications</i></p> <p>mZeal specializes in Cyber/Network Security, big-data analytics, and cognitive tools/applications for enterprise, mobile, healthcare, and financial environments serving federal and commercial markets.</p>
<p>0930-1100</p> <p>Module 5</p> <p>Social Banking – Using Behaviour to Drive Insights Immersive Design Session</p> <p>Start-ups are using social channels to form new methods of providing core-banking services such as lending and money transfers of all types. How do banks compete in this new world of non-banks? How are they able to avoid being “Uberised”?</p> <p>This session will cover best practices, case studies, and industry benchmarks for evaluating and emulating best-in-class social banking implementations for digital operations. Our facilitators will outline several user journeys for social media integration.</p> <p>The session will also include facilitated round table discussions aligned with user journeys, after which each participant will complete an organisational self-assessment along key dimensions in the social media enablement section of the DMM.</p> <p>Duration: 90 Minutes</p>	<p>Andrew Stephen <i>Professor, Saïd Business School</i></p> <p>Andrew Stephen is a renowned researcher in the field of social networking and markets. His research has been published in leading journals such as Harvard Business Review and Journal of Marketing Research, and has received wide press coverage including: Businessweek, CNN, Financial Times, and The Wall Street Journal. Professor Stephen is an advisor to a number of startups and has worked with companies such as American Express, WPP, and Google.</p> <p>Raman Bhatia <i>Head of Digital, UK, HSBC Retail Banking and Wealth Management</i></p>
<p>1100-1130 Break</p>	
<p>1130-1300</p> <p>Module 6</p> <p>Banking in the Clouds – Accelerating ROI Immersive Design Session: Case Studies</p> <p>Financial institutions that want to realise the improved operating metrics derived from cloud migration have difficult decisions ahead. Beyond the regulatory issues, there are crucial decisions regarding the vast data centre legacy investment and the security implications of using the cloud.</p> <p>This session will cover best practices, case studies, and industry benchmarks, for evaluating and emulating best-in-class cloud implementations for digital operations.</p> <p>The session will also include facilitated round table discussions aligned with user journeys, after which each participant will complete an organisational self-assessment along key dimensions in the cloud readiness section of the DMM.</p> <p>Duration: 90 Minutes</p>	<p>Nadeem Shaikh <i>CEO, Anthemis Group</i></p> <p>As CEO of Anthemis, Nadeem advises international financial services firms on strategic innovation, focusing on the emerging digital financial services ecosystem. Before founding Anthemis Group, he was president of First Data Corporation. Nadeem advises Barclays Techstars and Level39, both financial services incubators/accelerators, and is on the Board of a/b, Bento, Currency Cloud and Pay Perks.</p> <p>Dave Matthews <i>Global Wholesale Banking Technology Executive, Bank of America</i></p> <p>As lead of the Global Wholesale Banking Technology & Operations team at Bank of America, and a member of that organization’s leadership team, Dave oversees a team of technology professionals who design, develop, deliver and support effective and efficient technology solutions for internal business partners and Bank of America Merrill Lynch clients. He is responsible for ensuring the optimization of technology platforms to maximize scalability while minimizing support cost and risk</p>
<p>1300-1400 Lunch</p>	

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<p>1400-1530</p> <p>Digital Design – What Real Digital Transformation Looks Like</p> <p>Digital transformation is a cultural and organisational change to the complete bank structure, not just a front-end channel. Banks that understand this are seeing strong results, pushing them ahead of their traditional competitors as well as the new FinTech start-ups attacking their business.</p> <p>How will you develop the roadmap for your digital transformation journey? You will need to begin with a process of redefining your end state.</p> <p>In this session you will learn methods of thinking outside-the-box so that you will be able to reinvent to reinvigorate, and truly define the changes that will be needed to achieve this transformation.</p> <p>The session will use case studies, transformation frameworks, design/planning tools etc. to provide participants the inputs to developing the roadmap and 3-5 year plan.</p> <p>Duration: 90 Minutes</p>	<p>Gautam Jain <i>Global Head of Client Access, Transaction Banking, Standard Chartered Bank</i></p> <p>Gautam is responsible for providing market access to clients across the globe through best in class electronic channels, mobile money and an international network of branches, subsidiaries and alliances. He has vast experience in managing technology, business and audit functions, which encompasses both product and programme management.</p> <p>Senthil Ravindran <i>Chief Solution Architect, Polaris</i></p> <p>Senthil is the Chief Solution Architect and a co-contributor of the Digital Maturity Model. He is responsible for envisioning and designing the digital bank of the future based on open-source , emerging architectures.</p>
<p>1545-1645</p> <p>Leadership In a Time of Change</p> <p>The insights that you have gained will enable you to develop a set of future scenarios and then build a roadmap for the journey to your defined end state. To make this plan a reality it must be accompanied by the determination needed to overcome the inertia of the status quo. This session will provide insights on how best to effectively lead a transformation programme in your organisation.</p> <p>Peer-to-peer learning exercise will be facilitated.</p> <p>Duration: 60 Minutes</p>	<p>Michael Smets <i>Associate Professor, Saïd Business School</i></p> <p>Michael Smets is Associate Professor in Management and Organisational Studies. He is recognised as one of the first to blend theories in order to connect individual, organisational and institutional dynamics in the study of professional organisations.</p> <p>Thomas Schickler <i>Managing Director, Global Head of Product Management, Global Payments & Cash Management, HSBC</i></p> <p>Tom is responsible for driving HSBC's Cash Management business strategy in this market, leading a team of specialists to deliver integrated cash management solutions tailored to a range of companies, including multinational corporations, mid-market enterprises, small businesses and financial institutions.</p>
<p>1645-1730</p> <p>Digital Maturity Model Assessment and Roadmap</p> <p>This interactive peer-based closing session will focus on key takeaways for each participant and joint discussion on the roadmap for the digital transformation you will lead.</p> <p>During the course of the sessions, the participants would have completed the key data and information, self-assessments and analysis of "AS IS" state. This will lead to each participant plotting their organisation on DMM scale and identifying short-term targets and long-term goals for the organisation in terms of key business indicators. The model is an important part of the pre-conference preparation; and will be used in each learning module. The model, combined with the lessons learned from the faculty and industry leaders, will provide you with the insights needed to return to your organisation with a clear understanding of how to address the challenges you face</p> <p>Duration: 45 Minutes</p>	<p>Sanjay Vatsa <i>Chief Strategy Officer, Polaris</i></p> <p>Sanjay has significant experience in operational excellence, transformation, risk, and compliance. Sanjay is a co-creator of the Digital Maturity Model and is credited with creating other maturity models that have received wide industry acceptance.</p> <p>Jitin Goyal <i>Chief Executive Officer, Polaris</i></p>
<p>1730-1800</p> <p>Closing Session/Reception</p>	<p>Jitin Goyal and Theodore Malloch</p>