

Fenergo Client Council 2019

Where Customer Experience Meets Digital Transformation

AGENDA



Client Council 2019 Agenda

WEDNESDAY, 26TH JUNE 2019



13:00-14:00 Lunch

14:00-14:10

Welcome and Master of Ceremonies (MC) Introduction

Presented by: Margaret Kilroy

14:10-14:35

Welcome CEO Keynote: Setting the Scene

Presented by: Marc Murphy, CEO

14:35-15:35

Celebrating Customer Success

In this fireside Q&A, you will hear from some of our clients on the pioneering innovations they are actively implementing including Digital Client Journeys, eKYC and Self-Sufficiency programmes.

15:35-15:45

Demo Jam | Configuration Studio



Excellent event. I applaud you and the Fenergo team for having the courage to listen to your global customer base. I found it very constructive, well run and a terrific forum to meet with key members of the Fenergo team and peer firms.

Chief Data Officer,

Tier 2 Global Bank, US



15:45-15:55

Coffee | Networking | Demos

15:55-16:25

Panel Discussion | The Holy Grail: Achieving an Ultra Streamlined CLM Operation Across All

Divisions (Buy-Side, Private Banking, CIB, Commercial & Retail Banking)

In this panel discussion, Fenergo's Vertical Heads of CIB, Commercial, Business & Retail Banking, Asset Management and Private Banking & Wealth Management discuss the potential of creating a seamless and borderless Client Lifecycle process.

Moderated by: Rachel Whelan, Business Manager, Fenergo Panellists:

James Follette, Global Head of Commercial, Business and Retail Banking, Fenergo

Kevin O'Neill, Global Head of Buy-Side Division, Fenergo Steve D'Souza, Global Head of Private Bank and Wealth Management Division. Fenergo

Greg Watson, Global Head of Corporate Institutional Banking, Fenergo



16:25-16:35

Demo Jam | Innovation

Smart Document Extraction and RPA

16:35-17:30

The Client Roadmap: Mid-Term Priorities for Fenergo Product Enhancements

Presented by: Conor McGlynn, Director of Product Planning

17:30-17:35

Wrap-Up



19:00-19:30

Cocktail Reception



20:00-22:00

Welcome Dinner Powerscourt House

THURSDAY, 27TH JUNE 2019

8:45-9:10

Welcome Address

Margaret Kilroy, Event MC

9:10-9:45

Implementations in Focus

Moderated by: Louise O'Connell, Chief Customer Officer, Fenergo joined by Koen Fruyt, CIO - Digital Banking Clients & Employees - BNP Paribas CIB

9:45-10:15

Redesigning Client Lifecycle Management for a Digital Future

With every financial institution undergoing a digital transformation, Fenergo Experts dissect what that means for Client Lifecycle Management. This session will explore the impact that Digital Client Orchestration, Straight Through Processing, API-enablement and Cloud can have on redefining, re-envisioning and redesigning the end-to-end Client Lifecycle Management process.

Presented by: Niall Twomey, CTO, and Eimear Stokes, VP of Product Design



10:15-10:25

Demo Jam | Next Generation Fenergo

A preview of the future of Fenergo

10:25-10:55

Panel Discussion |

Challenges to Deliver the end-to-end Digital Client Journey

During this discussion the panel will explore the objectives, benefits and challenges of implementing a digital strategy within a financial institution.

Moderated by: Greg Watson, Global Head of Corporate Institutional Banking. Fenergo

Panellists: Nicola Poole, Executive Director Head of KYC, Client On-Boarding & Regulatory Support, Santander Craig Butterworth, Head of Global Account Management, Symphony

Manoj Khera, Executive Vice President, Capgemini

10:55-11:05

Demo Jam | Digital Client Orchestration

This session will explore how Digital Client Orchestration can enhance operational efficiencies gained through a reduction in system hand-offs, integration, rekeying and duplication of data, resulting in reduced time to onboard and an improved time to revenue.

Client Council 2019 Agenda

THURSDAY, 27TH JUNE 2019



11:05-11:20

Coffee | Networking | Demos

11:20-13:00

Breakout Working Groups

During this session, we'll team together functional peers from each financial institution to discuss key challenges and explore viable solutions. There are three breakout working groups. Please choose one in which you would like to participate.

Technology Forward:

In this breakout session, **Niall Twomey, CTO** will discuss technologies enabling digital transformation, Platform infrastructure & DevOps developments, and Fenergo technology roadmap priorities.

Digital Client Lifecycle Management:

Led by Brian Cahill, VP Client Solutions and Fiona Cummins, Director of Product Management, this breakout session will explore Fenergo's approach to digitalizing the client lifecycle. This will include:

- Digitalizing data & documentation (OCR, NLP, data extraction, comparison and deduplication)
- Accelerating the CLM journey through rules-based STP
- Pre-packaged integrations including ID&V, DocuSign, data source vendors, screening, robotics for downstream integration.

Integrating & Leveraging Data for KYC:

In this session, Joe Dunphy, VP Product Management and Aoife Doyle, Product Manager, will lead the discussion around the integrations for a more streamlined and efficient KYC process. Specifically, he will explore:

- Key providers for entity data, screening, ID&V
- Use of aggregators
- Rules-based approaches for determining sources and managing data sets
- Building the client profile (graphical hierarchies for complex clients).



13:00-13:45 Lunch | Demos

13:45-14:25

Fireside Chat | KYC Utilities – The Second Coming for KYC Sharing

With the resurgence in industry eKYC utilities in UAE, Asia and the Nordics, not to mention the many internal eKYC utilities being created within Fenergo's client organizations, this panel explores why the second iteration is already more successful than the first (from its previous heyday in 2014-5) and the key benefits that can be achieved through the Fenergo Sharing Network.

Presented by: Sean Moore, Sales Director Panellists: Abdulwahed AlJanahi, CEO, The Benefit Company

Hessa Hussain, Assistant General Manager, The Benefit Company

Jon May, CEO and Partner, JJCFinTech



14:25-14:35 Demo Jam | Bahrain KYC Utility

A quick preview into a new Fenergo project designed to deliver a shared KYC utility for financial institutions in Bahrain.

14:35-15:20 Pick Me Up



15:20-15:40 Coffee | Demos

15:40-16:10

Accenture Presentation

Customer Experience vs Controls: Evolving end-to-end Client Lifecycle Management. **Presented by:** Heather Adams, Managing Director, Accenture

16:10-16:30 Exos Presentation

Presented by:

Yvonne Wang, Head of Operations, Exos Joseph F. Squeri, CTO, Exos

THURSDAY, 27TH JUNE 2019

16:30-17:00

Breakout Working Group Review

During this session we'll hear from the breakout session leaders who will give an overview to the functional challenges and suggested solutions discussed during their sessions.

Moderated by: Jimmy Collins, VP of Global Project Delivery

17:00-17:10 Closing Remarks | Marc Murphy



Cocktail Reception



19:30-22:00

FRIDAY, 28TH JUNE 2019

09:00-12:30

Peer to peer activities and Fenergo Client Meetings



12:30-13:30 Closing Lunch



Get the most out of Fenergo Client Council 2019



Meet your peers in financial institutions from all across the world



Learn from the experiences of banks and financial institutions as they continue to digitalize their client management operations



Learn about the latest technologies that can significantly enhance your client lifecycle management processes

