



## **Fenergo Client Council 2019**

Where Customer Experience  
Meets Digital Transformation

**AGENDA**

***fenergo:.***

# Client Council 2019 Agenda

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

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, Fenengo'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, Fenengo

Panellists:

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

Kevin O'Neill, Global Head of Buy-Side Division, Fenengo

Steve D'Souza, Global Head of Private Bank and Wealth Management Division, Fenengo

Greg Watson, Global Head of Corporate Institutional Banking, Fenengo

16:25-16:35

Demo Jam | Innovation

Smart Document Extraction and RPA

16:35-17:30

The Client Roadmap: Mid-Term Priorities for Fenengo 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

Excellent event. I applaud you and the Fenengo 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 Fenengo team and peer firms.

Chief Data Officer,

Tier 2 Global Bank, US

# Client Council 2019 Agenda

THURSDAY, 27 <sup>TH</sup> JUNE 2019		THURSDAY, 27 <sup>TH</sup> JUNE 2019	
<div></div> <div><b>11:05-11:20</b> Coffee   Networking   Demos</div>		<div><b>13:45-14:25</b> 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 Fenengo'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 Fenengo Sharing Network.  <b>Presented by:</b> Sean Moore, Sales Director <b>Panellists:</b> Abdulwahed AlJanahi, CEO, The Benefit Company Hessa Hussain, Assistant General Manager, The Benefit Company Jon May, CEO and Partner, JJCFinTech</div>	<div><b>16:30-17:00</b> 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. <b>Moderated by:</b> Jimmy Collins, VP of Global Project Delivery</div>
<div><b>11:20-13:00</b> 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.  <b>Technology Forward:</b> In this breakout session, Niall Twomey, CTO will discuss technologies enabling digital transformation, Platform infrastructure &amp; DevOps developments, and Fenengo technology roadmap priorities.  <b>Digital Client Lifecycle Management:</b> Led by Brian Cahill, VP Client Solutions and Fiona Cummins, Director of Product Management, this breakout session will explore Fenengo's approach to digitalizing the client lifecycle. This will include:<ul style="list-style-type: none"><li>Digitalizing data &amp; documentation (OCR, NLP, data extraction, comparison and deduplication)</li><li>Accelerating the CLM journey through rules-based STP</li><li>Pre-packaged integrations including ID&amp;V, DocuSign, data source vendors, screening, robotics for downstream integration.</li></ul> <b>Integrating &amp; Leveraging Data for KYC:</b> 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:<ul style="list-style-type: none"><li>Key providers for entity data, screening, ID&amp;V</li><li>Use of aggregators</li><li>Rules-based approaches for determining sources and managing data sets</li><li>Building the client profile (graphical hierarchies for complex clients).</li></ul></div>		<div><div></div><div><b>14:25-14:35</b> Demo Jam   Bahrain KYC Utility  A quick preview into a new Fenengo project designed to deliver a shared KYC utility for financial institutions in Bahrain.</div></div>	<div><b>17:00-17:10</b> Closing Remarks   Marc Murphy</div>
		<div><b>14:35-15:20</b> Pick Me Up</div>	
		<div><div></div><div><b>15:20-15:40</b> Coffee   Demos</div></div>	
		<div><b>15:40-16:10</b> Accenture Presentation  Customer Experience vs Controls: Evolving end-to-end Client Lifecycle Management. <b>Presented by:</b> Heather Adams, Managing Director, Accenture</div>	
		<div><b>16:10-16:30</b> Exos Presentation  <b>Presented by:</b> Yvonne Wang, Head of Operations, Exos Joseph F. Squeri, CTO, Exos</div>	
		FRIDAY, 28 <sup>TH</sup> JUNE 2019	
		<div><b>09:00-12:30</b> Peer to peer activities and Fenengo Client Meetings</div>	
		<div><div></div><div><b>12:30-13:30</b> Closing Lunch</div></div>	



# Get the most out of Fenargo 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

For more information, please contact:  
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