



Mumbrella  
**FINANCE  
MARKETING  
SUMMIT**

## Welcome to the Mumbrella Finance Marketing Summit

When we first started looking at the line-up for the second Mumbrella Finance Marketing Summit it was immediately obvious there was one brand we wanted to hear from - Australia's oldest.

With Westpac celebrating its 200th anniversary in 2017, we knew that story of the evolution of one of Australia's most well-known brands would be a compelling one and we were delighted when Westpac's Chief Marketing Officer, Martine Jager, agreed to tell that story for the first time.

Also speaking for the first time to an audience dedicated to marketing is Anna Bligh, Chief Executive Officer of the Australian Bankers' Association and former Queensland Premier. At a time when banks, insurance companies, investment houses and payment companies are building ever-closer relationships with Australians, Bligh will bring an important message about trust and the crucial role marketers must play.

Just a few short months ago IAG appointed its first ever Chief Marketing Officer in former Saatchi & Saatchi New York CEO Brent Smart, and his views as an outsider coming into the industry are sure to provoke some lively discussion.

We hope the agenda is as dynamic and as stimulating as the industry itself and the opportunities that lie ahead. How has American Express used Facebook in Australia as a launchpad for a new social acquisition strategy? Just what is Google's view of the future of financial services? Can social media really be made safe?

Technology has also become a defining element of any marketing strategy. UBank's presentation on how it created Australia's first virtual home loan agent will lift the lid on the growing role of AI.

Also a big thanks to our sponsors, in particular Canstar for breakfast and Neuro-Insight for the Lunch & Learn session.

Wherever you look, there will be new insights, new opportunities and new ideas to take away. So thank you for coming today and I hope you find it valuable.

Cheers,  
Simon Canning



**Simon Canning**  
Finance Marketing  
Summit curator

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PLENARY		
8:25am	Welcome – Simon Canning, Curator	
8:30am	The Truth Behind Trust and Financial Services	
9:15am	Keynote: Changing the Way Australians Feel About Banks	
10:00am	There's No Such Thing as Low-Involvement Products, Only Low-Involvement Marketing	
10:45am	Morning Tea	
	STREAM ONE	STREAM TWO
11:15am	How the Face of Financial Services Will Change Over the Next Five Years	What Age, What Platform? How Does Age Change the Way Marketers Connect?
12:05pm	How Safe is Social Media?	How to Make Payments Emotional
12:50pm	Lunch <b>1:00pm Lunch &amp; Learn:</b> Using Neuroscience to Help You Stand Out in a Crowded Media Landscape Curated and presented by Lunch & Learn Sponsor:	
	STREAM ONE	STREAM TWO
1:45pm	The Growth of Innovation Centres and Their Role in Your Business Strategy	Case Study One: How UBank Brought Chatbots into its Marketing Mix Case Study Two: Creating a Brand – the Rise of the New Payments Platform
2:35pm	The Last Days of Last Click	Investing in Millennials with an Acorn
3:20pm	Afternoon Tea	
PLENARY		
3:45pm	Taking Control: How Consumers Are Now in the Driver's Seat	
4:30pm	Keynote: How Do We Stay Relevant?	
5:15pm	Networking Drinks	



**8:25am**    **Welcome - Simon Canning, Curator**

**8:30am**

### **The Truth Behind Trust and Financial Services**

In this exclusive research project Yell Creative founders Elizabeth Clark and Nigel Roberts will reveal the findings of a study into where marketers are planning to focus their efforts, the new emerging channels and the barriers faced in areas including trust and engagement.



**Elizabeth Clark**  
Co-Founder,  
Yell Creative



**Nigel Roberts**  
Co-Founder,  
Yell Creative



**Simon Canning**  
Advertising &  
Marketing Editor,  
Mumbrella  
(Moderator)

**9:15am**

### **Keynote: Changing the Way Australians Feel About Banks**

Speaking for the first time directly to the financial services marketing sector, Anna Bligh, Chief Executive Officer of the Australian Bankers' Association, will address how the ABA is working to strengthen the culture in banking and improve customer experience and the role marketers need to play. Anna has had a long and distinguished career in politics. She was Premier of Queensland for almost five years and led the response and recovery effort to devastating floods in January 2011.



**The Hon. Anna Bligh AC**  
Chief Executive Officer,  
Australian Bankers'  
Association



**Simon Canning**  
Advertising &  
Marketing Editor,  
Mumbrella  
(Moderator)

10:00am

## There's No Such Thing as Low-Involvement Products, Only Low-Involvement Marketing

Recently appointed as IAG Group's first ever Chief Marketing Officer, the former CEO of Saatchi & Saatchi in New York and winner of more than 30 Cannes Lions and 40 effectiveness awards, Brent Smart, will tackle the idea that the insurance and finance world is hampered by low-interest products. Smart will draw on more than two decades of experience working with some of the world's largest brands to show that marketing is what makes the difference.



**Brent Smart**  
Chief Marketing  
Officer,  
IAG Australia



**Simon Canning**  
Advertising &  
Marketing Editor,  
Mumbrella  
(Moderator)

10:45am Morning Tea



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## HELPING MARKETERS NAVIGATE THE AUTOMOTIVE INDUSTRY

At a time when the automotive industry is facing major disruption and upheaval, the **Mumbrella Automotive Marketing Summit** is the one event you can't afford to miss. From autonomous cars and the future of mobility, to the rise of consumer demands and impacts on brand experience, the world of automotive marketing is changing drastically.



**GRAEME WHICKMAN**  
President & CEO,  
Ford Australia &  
New Zealand



**CATHY COLLINS**  
Industry Head,  
Automotive,  
Google



**MARK HARLAND**  
Executive Director  
Marketing, GM Holden/  
GM International



**TERRI GOLDER**  
Head of Marketing  
Communications,  
Renault Australia



**MICHAEL MCLEAN**  
Head of  
Marketing & Customer  
Experience, Isuzu Australia

August 23, Sydney | [mumbrella.com.au/automotive](http://mumbrella.com.au/automotive)

11:15am

## Stream One

### How the Face of Financial Services Will Change Over the Next Five Years

Looking at the latest trends in financial services marketing from around the globe, Growth Mantra CEO Simon Corah picks the trends that will define the sector over the next three to five years. Corah will also look at the trends that have emerged even within the last few weeks that will have a major impact on how marketers operate in the future and how quickly the industry will have to adapt.



**Simon Corah**  
CEO,  
Growth Mantra

## Stream Two

### What Age, What Platform? How Does Age Change the Way Marketers Connect?

From a teenager's first bank account to the need for insurance, investment and finally superannuation and the road to retirement, the financial services industry is connecting with Australians of every age. But every audience is different, with varying allegiances to print, TV, digital, radio and mobile. Join this panel to learn what the differences really are between the age groups, the places where marketers can best connect with them and how each demographic is evolving as they grow older.



**Ben Hourahine**  
Strategy Partner,  
AnalogFolk



**Kaye Fallick**  
Publisher,  
YourLifeChoices



**Tim Duggan**  
Publisher,  
Junkee Media



**Alex Hayes**  
Publisher - Live &  
Bespoke, Mumbrella  
(Moderator)

**12:05pm**

## Stream One

### How Safe is Social Media?

Direct engagement with customers through social media has become increasingly popular with Australia's banks, insurers and investment companies, driven by access to more data. In an era where brand safety is paramount and the consumer controls the platform, the panel will discuss the risks and opportunities of social-driven marketing and how swiftly the environment is evolving.



**Julie Delaforce**  
General Manager,  
Quip



**Joanne Jacobs**  
Digital Strategist  
& Company  
Director, Managing  
Partner, Disruptor's  
Handbook



**Simon Lawson**  
General Manager,  
PHD Melbourne



**Paul Wallbank**  
News Editor,  
Mumbrella  
(Moderator)

## Stream Two

### How to Make Payments Emotional

PayPal Australia's Marketing Director Elaine Herlihy will explore how to tap into the emotions of payment service users, and where emotion comes into transactions. The way Australians pay for goods and services online has seen a massive transformation in just a few short years, but the question is: Have the messages that drive people to the moment of purchase kept up?



**Elaine Herlihy**  
Marketing Director,  
PayPal



**Alex Hayes**  
Publisher - Live &  
Bespoke, Mumbrella  
(Moderator)

12:50pm Lunch

1:00pm

### Lunch & Learn: Using Neuroscience to Help You Stand Out in a Crowded Media Landscape

Our memory is arguably our most important cognitive process, responsible for not only keeping a record of our past, but also guiding and influencing our future behaviours. This understanding, initially derived from the neurosciences, now helps marketers not only produce better, more memorable ads but can also increase marketing effectiveness in what has become a very fragmented marketing ecosystem.

In this lunch and learn session, Professor Emeritus Richard Silberstein will talk about the importance of memory encoding in advertising.



Professor Emeritus  
Richard Silberstein  
Chairman, Neuro-Insight

Curated and presented  
by Lunch & Learn Sponsor:



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**HEALTH & WELLNESS  
MARKETING  
SUMMIT**

Headline Sponsor



## KEEP ACROSS HEALTH AND WELLNESS MARKETING TRENDS

Join leading marketers from across Australia's health and wellness industry to explore sessions around data, privacy and trust, apps, content marketing, building a brand audience and more. Hosted by presenter of ABC Radio National's The Health Report, Dr Norman Swan, this is a new conference for marketers, agencies and publications working in the vast health and wellness industries.



**TANYA JOSEPH**  
Creator,  
This Girl Can Campaign



**LOLA BERRY**  
Nutritionist, Author, Yoga  
Teacher, Content Creator  
& Presenter



**LUKE BENEDICTUS**  
Editor,  
Men's Health



**SAMANTHA BRAGG**  
Head of Marketing,  
Fitness First



**REBECCA HOWDEN**  
Content Producer,  
Medibank & Editor,  
be. magazine

September 6, Sydney | [mumbrella.com.au/health](http://mumbrella.com.au/health)

1:45pm

## Stream One

### The Growth of Innovation Centres and Their Role in Your Business Strategy

Every year, major global brands will invest millions of dollars in building and operating customer innovation centres. These centres consist of ideation labs, demonstration zones and workshop spaces where clients are encouraged to develop, explore and experience the latest products and services from their host company. This session will examine the fundamentals of innovation centres, citing examples from the financial services industry, and how they can increase your customer engagement.



**David Woodbridge**  
Managing Director,  
the labs consultancy,  
Project Worldwide

## Stream Two

### Case Study One: How UBank Brought Chatbots into its Marketing Mix

UBank presents a case study on how it found a new way to help consumers navigate the challenges of finding the right home loan through the use of Australia's first virtual home loan agent – an intuitive chatbot. The presentation will include how the six-week project came to life and the key learnings UBank has gained for the future.

### Case Study Two: Creating a Brand – the Rise of the New Payments Platform

Find out how the New Payments Platform brand was built to respond to the challenges of transforming the future of payments in Australia, making the complex simple and enabling competitors to become collaborators in an increasingly digital economy.



**Jo Kelly**  
CMO,  
UBank



**Richard Curtis**  
CEO,  
FutureBrand



**Lisa Lintern**  
Communications  
Strategist,  
New Payments  
Platform Australia



**Vivienne Kelly**  
Editor,  
Mumbrella  
(Moderator)

**2:35pm**

## Stream One

### The Last Days of Last Click

Mobile and social have emerged as the new platforms for customer engagement which have broken long-trusted old marketing tools. In this session American Express and Facebook will look at how they are changing their approach, adopting new ideas and eliminating inefficiencies to allow them to scale their marketing model. Learn for the first time how Amex in Australia is leading the world in this space.



**Paul McCrory**  
Acting MD,  
Facebook ANZ



**Trudie Newcomb**  
VP - Acquisition,  
Early Engagement  
& David Jones,  
American Express



**Simon Canning**  
Advertising &  
Marketing Editor,  
Mumbrella  
(Moderator)

## Stream Two

### Investing in Millennials with an Acorn

Acorns is introducing a new generation to the importance of investing for the future. Acorns CEO George Lucas will chart the journey of the start-up in Australia and how the business is using a model that allows customers to round up their purchases through payment platforms and use the funds for investment – all operating through a mobile app that has placed the brand at the cutting edge of the financial services industry.



**George Lucas**  
CEO,  
Acorns



**Paul Wallbank**  
News Editor,  
Mumbrella  
(Moderator)

**3:20pm**

**Afternoon Tea**

**3:45pm**

### **Taking Control: How Consumers Are Now in The Driver's Seat**

Google's Head of Financial Services Colin Barnard reveals how emerging technology and the customer's greater desire for control is removing the friction from consumers' relationships with the financial services sector - and what is likely to come next.



**Colin Barnard**  
Head of Financial  
Services,  
Google Australia



**Vivienne Kelly**  
Editor,  
Mumbrella  
(Moderator)

**4:30pm**

### **Keynote: How Do We Stay Relevant?**

Two hundred years after Australia's oldest brand opened its doors, Westpac Group Chief Marketing Officer Martine Jager delves for the first time into how the Bank of New South Wales grew from a single outpost in 1817 to become one of the country's biggest brands. As Westpac celebrates its bicentennial year, Jager will also look to the future and how the bank will continue to evolve the way it communicates and connects with Australians.



**Martine Jager**  
Chief Marketing  
Officer,  
Westpac



**Simon Canning**  
Advertising &  
Marketing Editor,  
Mumbrella  
(Moderator)

**5:15pm**

**Networking Drinks**



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