



AI & ROBOTICS DIRECTORS' FORUM

AI & CX TRANSFORMING FINANCIAL SERVICES

27 JUNE 2019 • THE SHARD • LONDON

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Partners



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Summary agenda



09:30

Welcome by James Rapinac, Director, Gallup

09:35

Chairman's introduction by Martin Hill-Wilson, Customer Service, CX & AI Engagement Strategist

Martin is a Customer Service, CX & AI Engagement strategist and facilitator. He provides keynotes, masterclasses and transformation frameworks on omni-channel contact strategy, customer based quality management, emotion management for customer engagement and AI driven customer service.



09:40

Taking Your CX into the Future with Conversational AI

Opening Keynote by Chris Ezekiel, Founder & CEO at Creative Virtual

In an increasingly digital world, highly connected customers expect the same level of personalised, easy-to-access service and support from their financial institutions as they receive from companies across all other industries. For financial brands, this poses the challenge of incorporating new technologies with legacy systems while still maintaining compliance with strict industry regulations.



Chris Ezekiel has been working in the world of virtual assistants since 2000 and founded Creative Virtual in November 2003. Employing his technical and entrepreneurial skills, and through the development of the enterprise level V-Person™ technology, he has established Creative Virtual as one of the world's leading providers of virtual agents, chatbots and live chat. Under his leadership, the company was named the 2019 Product Leader for AI-Enhanced Customer Self-Service by Frost & Sullivan, listed as one of Britain's fastest growing private technology companies in the 2018 Sunday Times Tech Track 100 and honoured with the prestigious 2017 Queen's Awards for Enterprise in the category of Innovation.

10:10

The Evolution of Financial Services in the Face of Artificial Intelligence

Dr Djamila Amimer, Founder and CEO at Mind Senses Global

The use of AI in financial services will continue to grow across the board. The most prominent AI applications are expected to be in the areas of customer engagement with chatbots deployment, fraud detection and investment and stock markets prediction. However, artificial intelligence will have far more reaching impacts as it has the potential to radically change the face of financial services as we know it today.



Dr Djamila Amimer is the CEO of Mind Senses Global. She is a senior leader with over 15-year experience in AI and the oil and gas sector, delivering long term strategic initiatives and complex commercial projects across businesses. Djamila helps businesses and organisations apply artificial intelligence to improve performance and unlock its full potential.

10:40

Realising value from AI in business processes

Tom Castle, Head of Artificial Intelligence Practice & Development – Commercial Banking, Natwest

Many organisations are starting to experiment with machine learning models, moving from experimentation to realising benefits in production can prove difficult. In this talk Tom shares some ideas on how to tackle the business value challenge.



Tom Castle is Head of AI Practice and Development within the Commercial Bank at RBS. He has over 16 years of experience designing and delivering complex products and services, covering everything from trading systems through to digital platforms supporting small businesses. In his current role he is focused on helping the bank create best practice in the delivery of AI based solutions across the corporate and commercial bank supporting both customers and staff in achieving their goals.

11:10

Coffee

11:30

Cutting through the regulatory red tape

Mark Holmes, Founder & CEO at Waymark Tech

The "cutting of red tape" generally refers to a reduction of bureaucratic obstacles to action. Business representatives often claim red tape is a barrier to business, particularly small business. Learn how AI can help your compliance and legal teams cut through the regulatory red tape.



Mark Holmes is CEO of Waymark Tech, a company that provides AI-powered software to compliance officers to automatically identify and analyse changing regulations. He previously spent almost 15 years in financial services, holding roles at Traiana, HSBC, Nomura, Deutsche Bank, and Morgan Stanley. Outside of work, Mark is a passionate open water swimmer, and uses his swims to raise awareness and funds for Drowning Prevention.

12:00

Effective Strategies for Implementing AI in your organisation and the Power of Analytics

Mignon Mapplebeck, IT Director and CIO Advisor

With the AI technological landscape and the power of technological innovation accelerating faster than ever how are organisations going to capitalise on implementing AI effectively, what are the current challenges and opportunities? How do organisations go about assessing if they are ready for AI and the Power of Analytics. This talk will take the audience through these key concepts and approaches.



Mignon Mapplebeck (MBA, BComm) is a CIO Advisor and public speaker with expertise in Digital Transformation, AI and Analytics. She has worked for global organisations in various senior IT leadership positions advising, leading and directing on large portfolios of work ranging from Post-Merger Integration and Digital Transformation to large Analytics programmes. As part of her MBA she specialised in strategy with a focus on sustainable competitive advantage of which she was awarded outstanding MBA citizen through Warwick Business School.

12:30

Panel Debate

Host



Martin Hill-Wilson,
Customer Service,
CX & AI Engagement
Strategist

Panelists



Mignon Mapplebeck,
IT Director and
CIO Advisor



Francesco Brenna
Executive Partner,
**IBM Global Business
Services**



Chris Ezekiel,
Founder & CEO,
Creative Virtual

13:00

Lunch & Networking

14:00

Time to Humanise Tech - Populism, Techlash and the New Age of Retail Banking

Mark Cliffe, Group Chief Economist at **ING Group**

The fallout from the Global Financial Crisis and exponential tech change are fuelling a popular backlash. The dominance and behaviour of Big Tech platforms are suddenly in the spotlight. Retail banks, as trusted guardians of financial data, have an opportunity to step in. By applying behavioural science, a new consumer driven approach to AI could positively transform people's lives.



Mark Cliffe is Chief Economist of the ING Group, a global financial services group with 35 million customers. Based in London and Amsterdam, he leads a team of economists and strategists in 14 offices around the world. As well as analysing the global economy and financial markets, the team also studies consumer and corporate behaviour with a view to producing engaging content and innovative solutions. Mark travels the world explaining and debating the economic outlook with customers, and is frequently quoted in the media. A graduate of Cambridge University, he has worked for a variety of financial services firms, including HSBC and Nomura Research Institute.

14:30

Augmented Analytics by 2020

Case Study by **Saurabh Moody Voiceman**, Founder and CEO at **Alpha AI**

Saurabh Moody will talk about augmented analytics - a paradigm that includes natural-language query and narration, augmented data preparation, automated advanced analytics, and visual-based data discovery capabilities - will be a dominant driver of new purchases of business intelligence, analytics and data science and machine learning platforms and of embedded analytics.



Saurabh Moody is the creator of World's First AI Data Analyst which enables you to talk to your data, quite literally. Having built 2 data companies after his stint at Microsoft, he is now working on Augmented Analytics Platform - Alpha AI. He is an NLP Engineer, Data Scientist, Growth Hacker and a certified Scrum Master with experience in designing data models and analytics platforms. He was awarded MS Community Star, MS Most Valuable Professional in 2003 & one of the first 500 professionals in the world to achieve; MVP, MCT, MCTS, MCS, MCAD, MCDBA and MCP since 1998.

15:00

Panel Debate

Host



Hugo Pinto,
Managing
Director,
**Human +
Machine**

Panelists



Tom Castle,
Head of AI
Practice and
Development,
Natwest



**Djamila
Amimer**,
CEO, **Mind
Senses Global**



Mark Cliffe,
Chief
Economist,
ING Group



Clara Durodié,
technology
strategist
specializing

15:30

Coffee

15:50

Using XAI to Create the Hedge Fund of the Future

Aric Whitewood, Founding Partner at **WilmotML**

This talk will cover our approach to explainable AI in Asset Management, including our vision of the hedge fund of the future, which combines AI based systematic techniques with human based fundamental knowledge. I will also describe our prediction system (which is transparent, and whose decisions can be related to economic fundamentals), our investment strategies, and our more recent work on reinforcement learning for portfolio optimisation.



Aric Whitewood is cofounder of WilmotML (www.wilmotml.com), a machine learning and macroeconomics-focused investment and advisory firm. He is also an honorary senior lecturer in the Computer Science Department of University College London (UCL), for which he runs several research programs with UCL students on machine learning topics. Aric focuses on the combination of neuroscience, artificial intelligence, and investing, with a particular emphasis on developing investment systems that are transparent (enabling trust in investment decisions). Previously, he was Head of Data Science at Credit Suisse Zurich, where he ran AI projects across a number of businesses and geographic locations.

16:20

Transform your business with AI-powered decision makers

James Loft, COO, Rainbird.AI

James Loft COO of Rainbird, will discuss in his keynote, Transform your business with AI-powered decision makers, how businesses should be creating a culture of change by empowering their staff to become dynamic, AI-powered decision-makers to future-proof them for changing markets and regulation.



A man with his finger on the pulse of an ever-evolving marketplace, James is always looking ahead to the next 'game-changing' advancement in artificial intelligence. His mission: to demystify the world of 'Applied AI' for organisations and users alike. With a history in innovation and service design – he previously led an artificial intelligence consultancy firm that helped companies develop AI tools to fit their business needs – he possesses an in-depth understanding of the possibilities of the technology and the key part it will play in the future of industry. In his role as Chief Operations Officer, James is responsible for the daily business operations of the company.

16:50

Cracking the code: Turning AI into ROI

Keynote by Abhijit Akerkar, Head of AI Business Integration, Lloyds Banking Group

Two in every three companies invested in AI are yet to generate any tangible value. And of those companies that have turned the corner, almost half are still at sub-scale level. The good news is that value is not elusive. Companies such as Google and Amazon generate over 50% of their profits using AI. How can your company cross the chasm? How can you crack the code to conquer those AI riches?



Abhijit is bringing machine intelligence to life at the Lloyds Banking Group. His focus is on combining machine and human intelligence to fundamentally change the way the Bank does business and create completely new opportunities for customers and colleagues. Earlier, at McKinsey & Company, Abhijit engaged with leaders from large enterprises to help them take strategic and investment decisions, build new digital business models, and drive above-market growth. Previously, at HCL Technologies, Abhijit built and led tech-enabled businesses in Europe and Asia. An engineer by training, Abhijit has an MBA from London Business School with an exchange at MIT Sloan.

17:30

Event Close by Professor Andy Pardoe

Meet our Partners

creativevirtual
The science of conversation™

Creative Virtual is a global leader in conversational self-service solutions that bring together humans and artificial intelligence to enable anywhere, anytime customer and employee engagement. Leading organisations around the world rely on our award-winning V-Person™ technology to improve their support experience, reduce costs, increase sales and build brand loyalty. Our multi-lingual virtual agent, chatbot and live chat solutions earned us Frost & Sullivan's 2019 Product Leadership Award for AI-Enhanced Customer Self-Service. We were also honoured with the prestigious 2017 Queen's Awards for Enterprise in the category of Innovation and listed as one of Britain's fastest growing private technology companies in the 2018 Sunday Times Tech Track 100. Learn more at www.creativevirtual.com.



Founded in 2013, Rainbird empowers businesses to amplify their best people and find the smartest path to their business goals. Our AI-powered automation software combines human expertise to future-proof organisations for changing markets and oncoming regulation. From healthcare to financial services or retail to manufacturing, Rainbird will increase the rate and quality of key decisions made by your most impactful people. This will transform your productivity and customer outcomes. rainbird.ai



REFINERY

We are on a mission to tackle the horrible inefficiencies evident in the loan management space. Our solution allows institutional lenders, borrowers and their associated third parties to manage the full lifecycle of a loan from a shared technology platform, but with user specific workflows. Each participant can access one trusted source of digital data at both the loan and asset level, with a host of benefits from payment automation and error free loan tracking, through to faster loan transfers. refinery.io

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DIRECTORS' FORUMS

AI & CX Transforming Retail & Customer Data
Wednesday 17 July

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QUARTERLY ROUNDTABLES

The AI Roundtables are hosted as either Dinner, Breakfast or Lunch style events, for a small number of participants together with an expert speaker. These can be organised as a close corporate C-Suite workshop or as an open event to the general public.

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Please help us improve our events by providing your feedback and suggestions by taking a couple of minutes to answer a few simple questions for us via the link below: <http://bit.ly/AIRJuneSurvey>



AI & Robotics Events are organised by Informed AI Events
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