



Financial Services  
Group



## CIM Financial Services Marketing Leaders' Summit – AGENDA

13 May 2024

Venue: Reuters, Canary Wharf, London

The Chartered Institute of Marketing is proud to once again host the annual CIM Financial Services Marketing Leaders' Summit, created by and for financial services marketers to share best practices and promote excellence in marketing, sponsored by Adobe, the World Media Group and EI Advisory. This is an invite-only free half day event for senior financial services marketers culminating in lunch. The format will be an engaging mix of short key note panels followed by discussions at cabaret-style roundtables.

### **2024 AGENDA AND SPEAKER SESSIONS (all times in GMT)**

---

**9:00: *Welcome*** by **Jacob Howard**, Chair of the CIM FS Group and Director, Marketing, Deutsche Bank and introducing the moderators **Christoph Woermann**, Head of Brand, and CMO – Corporate Bank, Deutsche Bank and **Alison Harbert**, Marketing Director, Investec

**9:20: *Digital Trends 2024*** – keynote fireside chat with **Simon Murray**, FSI Strategy lead at Adobe and **Jim Clark**, Commercial Research Director at Econsultancy who will be presenting the 2024 Financial Services Digital Trends Report. You'll hear the trends driving customer experience and how you can stay one step ahead.

**9:55: *Practical applications of AI in Financial Services Marketing*** – panel discussion on practical steps that marketers have taken to use AI in their content and marketing strategies. **Rachel Nixon**, Director of Analytical Insights, CME and moderated by **Alison Harbert**, Marketing Director, Investec

**10:30: *Coffee break***

**10:40: *The Editors' View*** – four of the world's leading financial editors from US, Asia and Europe will discuss key trends in regional markets and who have been the perceived financial services winners and losers this year and why.

**11:20: *Brand and Purpose in Financial Services*** – panel discussion with marketing experts including **Christoph Woermann**, Head of Brand, Deutsche Bank

**11:50: *Coffee break***

**12:00: *Is now the time for Account Based Marketing in Financial Services?*** – panel discussion with marketing experts moderated by **Tony Jarvis**, Principal – EI Advisory.

**12:30: *What is your team's top priority for the year ahead?*** – table discussion for 15 mins and then insights shared by the tables.

**1:00: *What do CEOs want next from FS Marketers?*** – closing keynote with **Marg Jobling**, Group CMO, Natwest interviewed by **Alexandra Delamain**, Head of Global Client Partnership, The Economist.

**1:30: Session close and start of networking buffet lunch**



BBC NEWS

BUSINESS INSIDER

CNN

The Economist

Forbes

FORTUNE

NATIONAL GEOGRAPHIC

ASSOCIATE MEMBER

PARTNER



The New York Times

POLITICO

REUTERS

TIME

THE WALL STREET JOURNAL  
BARCLAYS GROUP

The Washington Post

The Atlantic

brand metrics

Smartology  
oianomi