

PEX LIVE: PEX Financial Services | Digital Conference 21-23 July 2020

Day One: Tuesday 21st July 2020

14:00 BST [Intertwining RPA and the Enterprise Risk Platform](#)

Over the past few years, Dwight has developed and been responsible for leading business transformations for the likes of Citi, Dun and Bradstreet and Axa XL, utilizing Lean Six Sigma, PROSCI, and RPA. He is a huge advocate of Lean 6 Sigma as being the bedrock for all future modernization and technology implementation. Find out why:

- Why Lean 6 Sigma needs to be the bedrock for all process transformation activity, both now and in the future
- Working out which is the most appropriate tool out of RPA, Lean 6 Sigma, AI, etc for each process task in turn, and deploying it correctly and efficiently
- Highlighting the need for due diligence to make sure that change is implemented properly first time, with minimal disruption to the rest of the business

Dwight Harris, Managing Director, Advancement Strategy Consulting at Business Transformation Group, Board Member, RPA Consultants and former CVP, Citibank, USA

15:00 BST [Discover Five Ways to Streamline Process Improvement with Process Mining](#)

How to improve an improvement process? Business process improvement is built upon optimized sub-processes and process steps, therefore process visualization and end-to-end monitoring are necessary to detect potential or existing issues. Yet, this is just the beginning. In this session, you'll learn about the differences between symptoms and causes of process inefficiencies, and we'll guide you to the right optimization path.

- Visualize process hygiene with Minit and get deep insights into the processes
- Monitor the status of business rules and minimize process inefficiencies
- Detect root causes and drive process improvement within Financial Services operations
- Uncover hidden potential for improvement of your Purchase to Pay (P2P) process
- Identify specific points of errors in payment process

Jana Gregusova, Process Consulting Leader, Minit

16:00 BST [Positioning Yourself for Success Amid Turbulent Times – Advocating a Digital Workforce for Every Enterprise](#)

Disruption is all around us: technological innovations, shifts in consumer behaviour, regulatory change, pandemics and geopolitics to name a few. Rather like the fabled Red Queen in Lewis Carroll's 'Through the Looking Glass', we can sometimes feel as if we have to run hard just to keep up. But in an increasingly competitive global market, ever more tightly driven by technological shifts, a winner-takes-all paradigm looks set to take hold. So how can we capitalise on disruptive change as a catalyst for growth, rather than simply aspiring to remain in the race?

- How to achieve dynamic agility to stand strong in the face of accelerated change
- How to embrace technological shift, rather than fear it
- Trends and examples from Financial Services firms
- How cognitive, intelligent (AI), hyper-productive Digital Workers can help to control operational challenges

Peter Walker, EMEA CTO, Blue Prism
Brian Halpin, Chief Customer Officer EMEA, Blue Prism

17:00 BST [How to Orchestrate and Implement 'Lean' Internal Development](#)

Michael Dove is responsible for training and certifying Lean 6 Sigma at PSCU and has is responsible for implementing process change internally within the bank. Find out how he has been prioritising implementation:

- Considering the huge amount of change that financial services organisations have dealt with over the last decade - moving from check payments through to credit cards through Apple Pay, Samsung Pay, peer-to-peer and blockchain and beyond
- Why the pace in the payment space is speeding up and reflecting on how hard operational systems have had to work behind the scenes to keep up with this change
- Managing the successful implementation of RPA at PSCU, and detailing the results of a successful pilot now completed
- Designs for implementing Lean 6 Sigma and becoming more agile across the business

Michael Dove, VP Center of Process Excellence, PSCU, USA

Day Two: Wednesday 22nd July 2020

14:00 [Building Scale by Consolidating and Streamline Processes and Resources](#)

Emirates Insurance have just completed a pioneering pilot project to implement a series of new sub processes across the business, which has led to greater efficiency internally and more control over their interactions with customers at every point of their service chain. Paul McLeod explains how they have rolled out these changes and as a result of the pilot's success, discusses plans for further process optimization across the rest of the business in the future:

- Consolidating processes for better internal management and co-ordination of resources
- Operating in a proactive manner, looking at workflow capability and improving internal staff metrics around SLAs to deliver a better claims service to customers than previously
- Producing of a new customer charter with a guarantee to respond to customer claims within 24 hours
- Clearing the old claim backlog, leading to a 15% increase in claim processing, and a 23% reduction in open claims and a much more efficient internal operation

Paul McLeod, Chief Operating Officer, Emirates Insurance, UAE

15:00 BST [RPA Success Story: How Carter Bank & Trust Achieved 3,800% ROI with RPA](#)

Carter Bank & Trust was spending far too much time on error-prone, manual tasks. As a growing community bank, they were determined to spend less time on routine processes, and more time providing excellent service for their customers. That's why they turned to robotic process automation (RPA) software from HelpSystems—and achieved a 3,800% ROI in just five months. Find out how Carter Bank & Trust has saved over \$1 million dollars in less than a year with RPA. In webinar, hosted by Donnie MacColl, Director Technical Services, EMEA at HelpSystems, he will discuss:

- The situation that led Carter Bank & Trust to find a better way to work
- Best practices for getting buy in, implementing an RPA solution, and tracking results
- Why they chose Automate and share a live demo of RPA in action

Donnie MacColl, Director of EMEA Technical Services, HelpSystems

16:00 BST [Automation Practices Fit for Both Pandemics and Long-Term Success](#)

While automated workflows and real-time reporting create 20% increases in organizational efficiency and time savings, the hidden value of these technologies have kept many businesses flexible since the start of the pandemic. Learn how financial services leaders identify which automation practices best serve their needs and how their businesses are better able to adapt to the current economic landscape.

Learning Objectives:

- Identifying the best opportunities to add automation for long-term success
- How to apply programmatic approaches for business continuity & disaster recovery
- Best practices to avoid “over-automating”
- Create real-time reporting unique to any stakeholder

Evan Stos, Vice President-Customer Experience, Onspring

Kelly Miller, Senior Manager Information Security, Western Union

17:00 BST [Unleashing the Benefits of Full, Holistic Process Transformation](#)

Westfield Insurance are currently undertaking the largest process transformation exercise ever in the last 178 years. Find out from Amir Farid, on the front line of these changes, about their rationale for the digital transformation and process evolution strategies they are implementing, and the results they are experiencing so far:

- Leading process transformation across 18 business models across Westfield Insurance over a nine-year period
- Deploying intelligent automation at the point of service, balancing no-touch, low-touch and high-touch transactions
- Reporting back on results of the first phase of transformational deployment, and where automation has proved most useful
- Why job roles are changing in line with these changes and increasing agility within the business, and detailing expectations for the future

Amir Farid, Chief Operating Officer & Chief Transformation Officer, Westfield Insurance, USA

18:00 BST [The Top 3 Automation Opportunities for Banks](#)

Today, more than ever, Financial institutions need to automate processes to remain competitive. Forward thinking banking leaders are re-imagining how virtual and physical work are performed. With more workers being remote, processes need to change.

- Learn how process mapping allows for process documentation and optimization while also identifying automation opportunities; how robotic process automation, or RPA, can improve operational efficiency and accuracy while connecting legacy systems; and how workflow automation, Document Generation and eSignature allow banks to automate almost any process challenge.
- Discover three real-world banking use cases leveraging the Nintex automation platform to achieve improved efficiency and accuracy
- Explore how through automation, these banks are providing better customer and employee satisfaction, as well as ensuring regulatory and standards compliance.
- Many banks have legacy systems or custom applications that are expensive to update and notoriously difficult to automate. Discover how Nintex is allowing companies to connect to these systems easily, accessing the critical data within, without the need to write code or replace them all up.

Andre Ropeta, Senior Product Marketing Manager, Nintex

Karen Reichle, VP, Global Customer Success Engagement, Nintex

Day Three: Thursday 23rd July 2020

14:00 BST [From Zero to 300+ Automated Process – The Access Bank Process Automation Journey](#)

Access Bank, a fast growing global bank with \$20 Billion in assets, has undergone a full digital transformation during the past few years under the stewardship of Ade Bajomo, Executive Director in charge of innovation and technology. Access Bank implemented ProcessMaker and automated 300+ processes over 2.5 years including all of its core processes for loan origination and account opening. Mr. Bajomo estimates the bank saves more than \$10 million per year thanks to ProcessMaker. In this webinar, Mr. Bajomo will discuss Access Bank's digital transformation journey:

- Situation at the bank prior to implementing ProcessMaker
- Implementation Strategy for their Business Process Management (BPM) Solution
- Intersection of RPA & BPM at the bank
- Keys to successful transformation at the bank
- How the bank's automation has been essential for success during COVID-19

Ade Bajomo, Executive Director, Access Bank

Peter Brown, VP of Solutions, ProcessMaker

15:00 BST [Organizational Ambidexterity – Balancing Efficiency and Innovation](#)

Organizational Ambidexterity represents the successful balancing of efficiency and innovation and has been linked to things like organizational learning, competitive advantage and organizational survival. Being both efficient and innovative can be an operational challenge in the best of times but when going through a crisis and adapting to a global pandemic it can feel impossible.

In this interactive session, hosted by Thoughtexchange COO and Sweden's most innovative leader in 2019, Jessica Nordlander will explore how to find paths to driving both efficiency and innovation in a time of unprecedented change whilst unlocking employee engagement in innovation and transformation during these times.

Jessica Nordlander, Chief Operating Officer, Thoughtexchange

16:00 BST [Innovating Your Business Efficiency in a New World](#)

- How to use process and content intelligence in your digital transformations and automations
- Working with process & content intelligence to increase business efficiency.
- A new understanding of how to use ABBYY's digital intelligence platform to achieve digital transformations and assist with automations

Ryan Flynn, ABBYY Senior Territory Manager, United States and Canada, ABBYY Software

Jasa Todorovich, Partner / Co-Founder, Todologix