

**Day One: Tuesday 21<sup>st</sup> July 2020**

**14:00 GMT Intertwining RPA and the Enterprise Risk Platform**

*Dwight Harris is responsible for RPA rollout at Kansas City and a huge advocate of Lean 6 Sigma as being the bedrock for all future modernization and technology implementation within the company.*

*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, Senior VP & Consultant, Citibank, USA**

**15:00 GMT Discover Five Ways How 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 GMT Advocating a Digital Workforce for Every Enterprise**

*Digital transformation and intelligent automation stand can enable companies to optimize their business process operations through greater flexibility, leveraging deeper insight into every area of the network and leading to dramatic results. Join BluePrism as they share best practices on how to get implementation right:*

- Why Robotic Process Automation (RPA) must deliver more than just business process automation and reduced manual business processing and how to go about this
- Achieving dynamic agility which can stand strong in the face of accelerated change.
- How cognitive, intelligent (AI), hyper-productive Digital Workers can help to control operational challenges and thrive with greater speed, agility and scale

**Senior Representative, BluePrism**

**21-23 July 2020**

**DRAFT AGENDA**

**17:00 GMT 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 22<sup>nd</sup> July 2020**

**14:00 GMT Design Thinking and Analytics to Solve Legacy Systems and Processes**

- Manoeuvring a constrained system - difficulties and challenges and how to overcome them
- Utilization of analytics to redesign your transformational approach
- Achieving data quality reports and regulation

**15:00 GMT Case Study: Automating Manual Tasks for Rapid Success 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 GMT 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**

**21-23 July 2020**

**DRAFT AGENDA**

**17:00 GMT 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**

**Day Three: Thursday 23<sup>rd</sup> July 2020**

**14:00 GMT 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 GMT Securing Systems and Processes to Safeguard Business Operations**

- Exploring the financial and practical benefits of new technologies and alternative solutions to keep your operations secure
- Examining why records are still often siloed, overly complicated and vulnerable to external cyber threats
- Highlighting the importance of proactive system maintenance and making sure that all operations are properly secure, both now and in the future

**Senior Representative, ThoughtExchange**

**16:00 GMT Quick Wins for Workflow Management**

- Buying time for your internal processes and increasing reliability of your systems and processes
- Making sure you know if you should apply a process before actually doing it
- Developing talent management and learning solutions
- Achieving successful integration of new workflow processes

**17:00 GMT Expert Insight: Bringing People With You on the Process Excellence Journey**

*Even the best process excellence initiative is only as good as the people who implement and uphold it – join Mike as he discusses the importance of bringing staff on the digital transformation journey with you to make sure that process excellence is tangible and sustainable in the short, medium and long-term:*

- Getting buy-in from staff and managers who create process excellence change – otherwise the whole thing is for nothing
- AI and automation is great – but don't forget the true value of the human element, which are the drivers of change, and will always need to be a part of your plan
- Tips for moving seamlessly from old school processes to true process excellence across the whole of your organization, both now and in the future

**Mike Morales, Exec Director of Performance, JP Morgan Chase**