



Directors  
Club®

BREAKFAST BUSINESS SCHOOL

VIRTUAL ROUNDTABLE

Changing Customer Expectations and the Role of "Purpose" in  
Customer Engagement, Acquisition and Retention

This session will bring together senior customer-centric leaders in  
banking, financial services and insurance and seek to understand  
"purpose" and its growing influence over customers' expectations and  
decision-making

September 28th

8am - 9.30am BST

[RSVP](#)

## **AGENDA**

Welcome to the Breakfast Business School.

90-minutes of informal, relaxed and free-ranging discussion moderated by Jon Snow.

Delegates can contribute as much or as little as they wish. There is no pressure.

## **DELEGATES**

For this session, we are inviting senior customer-centric leaders from banking, financial services and insurance.

If you feel this invitation is more appropriate for a colleague, you can please forward internally.

## **FORMAT**

No cost and **no preparation** required.

This virtual roundtable will be delivered using the GoToMeeting video conference platform.

The Chatham House Rule will be invoked, creating a trusted and confidential forum.

## **RSVP**

To accept this invitation, please [click here](#) and fill out a short registration form (1-min).

Alternatively, you can reply to the covering email or call Jon Snow on 07966 191 128.

## SEMINAR SYNOPSIS

“Brands are facing intense pressure to stand for something bigger than the products and services they sell. Today, eight in 10 global consumers say **purpose** is at least as important to them as CX.” **Accenture, 2021**

Financial Services are already feeling the impact of today’s **digital experience economy**. Simply providing digital capabilities is no longer enough. Consumers want engagement to be as fast and easy as the leading big tech, digital consumer brands, and fintech companies. They also want to purchase brands they believe in and can advocate for.

In particular, Gen-Y and Gen-Z want to "wear" the brands they purchase - be they trainers or a bank account. They want to be elevated by the brands they associate with. They want to be proud of their purchases and communicate that pride to family, friends and followers. Customer experience is not just functional but also emotional.

As such, **purpose** is becoming a key point of competitive difference.

Join Jon Snow and ten industry peers for this informal, relaxed and free-ranging discussion, during which we will cover:

- Have customers’ expectations evolved beyond great touchpoint experiences?
- Can we track changing customer expectations and what influences them?
- Has social media amplified the role of **purpose** and **personalisation** when engaging customers?
- Should banking, financial services and insurance look outside of their traditional verticals for direction and benchmarking?

## DIRECTORS CLUB

Today's [Directors Club](#) has its origin as a supper club in London's Mayfair.

The Directors' Dining Club, as it was known, had its home at Claridge's Hotel and brought together business leaders of the day to discuss trends and disruptive forces for change.

In February 2010, Jon Snow (founder and chairman) re-constituted the dining club as the Directors Club and so a business lifestyle and networking institution was born.

The Club motto **To endeavour. To achieve** captures the spirit of the organisation and the ambitions of its members.

## SESSION SUPPORTER

The thought-leadership for this session will be provided by [Medallia](#).

Medallia is the pioneer and market leader in Experience Management.

Medallia's award-winning SaaS platform, the Medallia Experience Cloud, leads the market in the understanding and management of experience for customers, employees and citizens. Medallia captures experience signals created on daily journeys in person, on calls and digital channels, over video and social media and IoT interactions and applies proprietary AI technology to reveal personalised and predictive insights that can drive action with tremendous business results.