

Agenda

DAY 1: Wednesday, July 16, 2014

9:00-9:30 am

Welcome and Introduction

Sala 500

Challenge: To reach excluded populations with high-value, next-generation financial services, offered on a commercially viable basis.

Reeta Roy – President and CEO, The MasterCard Foundation

Robert Christen – President, Boulder Institute of Microfinance

9:30-10:00 am

Keynote Address: The Quest for Customer-Centricity

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How have "money" companies made the journey towards customer-centricity?

Leslie Witt – Director, Design for Money, IDEO

10:00-11:00 am

Session 1: A Practitioner's View on Client-Centricity

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What are the challenges that a firm faces in becoming a client-centric provider?

Moderator: Gerhard Coetzee – Senior Financial Sector Specialist, CGAP

Panelists: Leon Lourens – Managing Director, PEP Stores and Mark Flaming – Chief Operating Officer, MicroCred

11:00-11:45 am

Break

Nizza Bar

11:45 am-1:00 pm

Session 2: The Client Journey: "Engage" Phase

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How can we learn about client needs in a cost-effective manner and how can we use this knowledge to influence product and service design, and delivery channels?

Moderator: Tillman Bruett – Program Manager, UNCDF

Panelists: Daryl Collins – Managing Director, Bankable Frontier Associates;

Olivia White – Associate Principal, McKinsey & Company; and

Marco de Natale – CFO, FINCA Azerbaijan

1:00-2:00 pm

Lunch

Glass Room

AGENDA

2:00-5:15 pm *(session includes 45 minute break)*

Session 3: Breakout Workshops on Client-Centric Design Tools

Conference Rooms

From Insights to Action: The quick and dirty on human-centered design. Yanina Seltzer – Financial Sector Analyst, CGAP and Leslie Witt – Director Design for Money, IDEO

Managing a diverse client universe through segmentation. Mikkel Krenchel – Senior Manager, ReD Associates

Kaleido: A 360° customer profiling tool for design of financial products and services. Raghu Kolli – Vice-President and Head, LIVELABS; Kshitij Sawant – Lead Innovation Consultant, LIVELABS; and Tanaya Kilara – Financial Sector Analyst, CGAP

Transactional Data: How operators leverage data to deliver a better service. Lara Gilman – Senior Commercial Manager, GSMA MMU; Adam Wills – Business Intelligence Manager, GSMA; and Arunjay Katakam – Market Intelligence Analyst, GSMA MMU

Human-centered Design in Action: What it takes to make it work. Ravi Chhatpar – Co-Founder and Principal, Dalberg Design Impact Group (DIG); Matt Shakhovskoy – Associate Partner, Dalberg; and Robin Miller – Associate Partner, Dalberg; Dalberg + CGAP

Hurry up Slowly: Identifying clients' needs in evolving markets for mobile financial services. Peter Goldstein – Vice President Business Development, InterMedia and Anastasia Mirzoyants-McKnight – Director, Research and Operations, InterMedia

5:15-6:00 pm

SHOWCASE: “Clients at the Center” Workspace

North Foyer

Launch of the CGAP “Clients at the Center” website and the virtual Community of Practice (CoP).

Mark Wensley – Program Manager, Financial Inclusion, The MasterCard Foundation

Gerhard Coetzee – Senior Financial Sector Specialist, CGAP

Kai Bucher – Communications Officer, CGAP

Karel León – IT Manager, CGAP

6:00-7:00 pm

Meet and Greet Cocktail

NH Lingotto

Garden of Wonders

AGENDA

DAY 2: Thursday, July 17, 2014

8:30-9:00 am

SHOWCASE: Recognizing Innovations in Financial Inclusion and MIT Innovations Competition

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Iqbal Quadir – Founder, Legatum Center
Ann Miles – Director, Financial Inclusion, The MasterCard Foundation

9:00-9:30 am

Keynote Address: Building a Client Base: The Econet Experience

How does a provider achieve widespread awareness and ubiquity of access to develop the long-term profitability of products?
Strive Masiyiwa – Founder and Chairman, Econet Wireless

9:30am-1:10 pm *(session includes 45 minute break)*

Session 4: Buy and Use: Breakout Workshops on Tools for Financial Inclusion Products and Services

Conference Rooms

Win, Win, Win? Practical tactics for implementing a magical balance strategy in microinsurance. Michael J. McCord – President, MicroInsurance Centre

Engaging the Client Across the Portfolio: Improved service through a data analytics approach. Daryl Collins – Managing Director; Natalia Gomez – Associate; and Kristy Bohling – Associate, Bankable Frontier Associates

Agent Networks: The key to delivering successful digital financial services. Kimathi Githachuri – Head of the Helix Institute of Digital Finance, MicroSave

When Money Isn't Enough: A case study of developing asset financing for smallholder farmers in East Africa. Andrew Youn – Founder and Executive Director and Mike Warmington – Manager, One Acre Fund

Tools to avoid, track, and understand client over-indebtedness. Barbara Magnoni – President and Laura Budzyna – Research Consultant, EA Consultants

Make it Simple: Financial heuristics for effective behavioural design of financial products. Marina Dimova – Vice President, ideas42

1:10-2:10 pm

Lunch

Glass Room

2:10-3:20 pm

Session 5: Debate on the Best Way to Interact with Clients: High-Touch or Low-Touch

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Proposition: The future of financial services for the poor will rest primarily in highly-automated, low-touch models.

Moderator: Kim Wilson – Senior Fellow and Lecturer, Tufts University

Panelists: Andrew Youn – Founder and Executive Director, One Acre Fund;

Bindu Ananth – President, IFMR Trust;

Katie Nienow – Co-Founder, Juntos Finanzas; and

Eric Muriuki Njagi – General Manager of New Business Ventures, Commercial Bank of Africa

AGENDA

3:20-4:05 pm

Break

Nizza Bar

4:05-5:50 pm

Session 6: The Client Journey: “Use and Regular Usage” Phases

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What did you do to ensure that initial purchase transferred into sustained usage?

Moderator: Katie Martin – Managing Director, ideas42

Panelists: Dolores Torres – President and CEO, CARD Bank;
Lara Gilman – Senior Commercial Manager, GSMA MMU; and
Charlotte Vangsgaard – Managing Partner, ReD Associates

6:00-8:00 pm

**Boulder Institute of Microfinance - 20th Anniversary
Celebration of the Microfinance Training Program (MFT)**

Lingotto Congress Centre Main Lobby

AGENDA

DAY 3: Friday, July 18, 2014

8:30-8:50 am

DEMO: MindBlown Labs - Leveraging Financial Capability to Drive Business Value

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Jason Young and Tracy Moore – Co-Founders, MindBlown Labs

8:50-10:00 am

Session 7: The Business Case for Client Value

How do we balance client value with the business case?

Moderator: Robert Christen – President, Boulder Institute of Microfinance

Panelists: Jeff Abrams – Senior Associate, Bankable Frontier Associates;

Natalia Gomez – Associate, Bankable Frontier Associates;

Michael J. McCord – President, MicroInsurance Centre; and

Lorenzo Chan – President and CEO, Pioneer Life Inc.

10:00-10:45 am

Session 8: Panel: Why are We Needed in the First Place?

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Are conventional players losing clients to non-conventional players?

Is the double bottom line the differentiation from other industries?

Is it perceived as such by clients?

Moderator: Matthew Bishop – US Business Editor and New York Bureau Chief, The Economist

Panelists: Kamal Quadir – CEO, bKash; Stephen Peachey – Technical Advisor, Doubling Savings Accounts Programme, World Savings and Retail Banking Institute (WSBI); and Greta Bull – Program Manager, Micro Retail Sub-Saharan Africa, International Finance Corporation

10:45-11:30 am

Break

Nizza Bar

11:30 am-1:00 pm

Session 9: Moving from Intention to Action

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What are the core concepts and key issues that emerged from the Symposium?

Tilman Ehrbeck – CEO, CGAP

Robert Christen – President, Boulder Institute of Microfinance

1:00-1:15 pm

Closing and Acknowledgements

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What is the shared vision for the Symposium series? What will our concrete contributions to support the global community's efforts to place clients at the centre of financial inclusion be?

Ann Miles – Director, Financial Inclusion, The MasterCard Foundation

Robert Christen – President, Boulder Institute of Microfinance

1:15-3:00 pm

Farewell Luncheon

Glass Room