



2020 Marketing in Financial Services Forum

Tuesday 10 March 2020

Jersey International Business School

3 hours' CPD

- Joseph McKenna, The Beach
- Mari Hietala-David, Intertrust
- Jo Buchanan, Grant Thornton
- Kate Kirk, Ogier
- Richard Field, Appleby (Guernsey) LLP
- Louise Donadieu, Avidity



Overview

Over the last decade, marketing in financial services has evolved massively. This event aims to look at a range of key areas within the marketing function, advising delegates on how to capitalise and cash in on new innovative marketing methods.

Leaning on the hard-won experience of industry experts, this event will explore how branding within financial services has evolved, how the digital revolution has disrupted the traditional marketing methods that were used in the 20th century, and finally it will look at megatrends to watch out for throughout the next decade.

Details

Date: Tuesday 10 March 2020

Time: 14:00-17:00 (Registration from 13:45)

Venue: Jersey International Business School

Cost: £195

CPD: 3 hours

Discounts: 20% for CIM & CIPR members

10% for BPP Loyalty Scheme members (Discounts cannot be used in combination)

Book your place

Book online at bppevents.com

13:45-14:00	REGISTRATION & REFRESHMENTS	
14:00-14:10	Joseph McKenna Strategic Director at The Beach	Chairman introduction
14:10-14:40	Mari Hietala-David Director of Global Marketing at Intertrust	Changing marketing strategy in a fast-growing organisation
14:40-15:10	Kate Kirk Director of Marketing at Ogier	Developing an employer brand with internal and external impact
15:10-15:30	BREAK	
15:30-16:00	Richard Field Partner at Appleby (Guernsey) LLP	GDPR: the impact on marketing in the financial services industry
16:00-16:30	Jo Buchanan Head of Marketing at Grant Thornton	Cutting through the white noise of social media – how best to stand out
16:30-17:00	Panel discussion with: Joseph McKenna (Chairman), Kate Kirk, Louise Donadieu, Richard Field & Jo Buchanan	2020 vision – marketing megatrends to look out for during the next decade

Meet the Chairman & Speakers.



**Joseph McKenna
(Chairman)**

Strategic Director at The Beach

Joe works closely with clients to co-create strategic direction, built upon in-depth qualitative insight, positively developing market-orientated cultures to ensure long-term shareholder value.

Joe delivers expertise on subjects such as Corporate and Brand Strategy, User Experience, Operations, Corporate Culture, Insight Systems, M&A, Corporate Identity, Employer Branding, Employee Engagement, and Behavioural Economics, and has led global insight and consultancy projects for Fortune Global 500 clients across a wide range of industries, including leading global finance and legal firms, the world's leading management consulting firm and three of the seven top global pharmaceutical corporations. Combined with wide jurisdictional experience having worked in Jersey, London, Shanghai, Guangzhou, Manilla, Tokyo, Dallas and New York, Joe has both the breadth and depth of knowledge to significantly improve corporate performance.

Joe has a Global MBA with a focus on Advanced Corporate Finance, Private Equity and M&A (Distinction), is a certified Lean Six Sigma Black Belt, has a Policy MSc, is a CMI Chartered Manager (with a Postgraduate Diploma), is a CIM Chartered Marketer (with a Postgraduate Diploma), and regularly coaches senior management professionals.



Kate Kirk

Director of Marketing at Ogier

Kate is global Director of Marketing at Ogier. An award-winning communications specialist whose career began in journalism, Kate has 20 years' marketing experience spanning public, private and third sectors.

Working within Ogier's Business Services team, Kate provides PR and communications support to each of Ogier's jurisdictions and service lines. As well as focusing on brand development, digital marketing, thought leadership and internal communication, Kate has developed Ogier's CSR programme.



Jo Buchanan

Head of Marketing at Grant Thornton

Jo is Head of Marketing for Grant Thornton. Grant Thornton Channel Islands is a member firm of one of the world's leading networks of independently owned and managed assurance, tax and advisory firms. It is Jo's aim to increase Grant Thornton's brand profile as the leading business advisor to dynamic organisations in Jersey.

Jo offers more than twenty years' experience in integrated marketing communications, specialising in digital marketing and marketing strategy. Jo is a Fellow of the Chartered Institute of Marketing with Chartered Marketer status (qualified at CIM postgraduate diploma level). In her day to day, Jo supports the local service lines by designing creative opportunities for fee earners to connect with senior corporate players working in the local financial services industry. She also focuses on social media, internal communications for a fast-growing team, and the delivery of an inclusive thought leadership programme, advising organisations on complex business issues and regulatory developments.



Mari Hietala-David

Director of Global Marketing
at Intertrust

Mari oversees the marketing strategy for Intertrust globally and their 18-strong marketing team. She is a senior marketer with a deep knowledge of all the marketing channels having worked in the industry for over 15 years. Mari helps companies increase their revenues with strategic marketing activities and brand building. Before she joined Intertrust, then Elian, she was responsible for marketing State Street's Private Equity and real estate business in Europe and headed up marketing for the firm's offices in the Channel Islands. In 2019 Mari and her team won marketing awards for their global marketing campaigns and initiatives. Having lived and worked in the UK, US, Finland, Jersey and now in the Netherlands, Mari has real insight into making campaigns, communications and business development programs work across time-zones, cultures and languages.



Richard Field

Partner at Appleby (Guernsey) LLP

Richard is a Partner in the Dispute Resolution & Regulatory team at Appleby, specialising in corporate and commercial litigation and regulatory matters. His regulatory focus covers the areas of data protection and cyber, AML and compliance, technology and eGaming.

Richard has been working on data protection matters for some years and is at the forefront of advising on Guernsey's Data Protection Law and GDPR. He sits on the States of Guernsey's GDPR Industry Working Party and has recently been elected Chairman of the Bailiwick of Guernsey Data Protection Association. He is also a member of the International Association of Privacy Professionals and a qualified GDPR Practitioner. He has written and spoken extensively about data protection, information management and cyber issues in a legal and practical context and is considered one of the leading lawyers on the island in this area.

Richard has acted for a range of local and global institutions on complex, cross-border disputes involving funds, banking and investment relationships and trusts. Many of the cases he has worked on involve fraud, asset tracing and applications for injunctive relief, or regulatory issues (such as enforcement, AML, bribery or sanctions), often resulting in ground-breaking judgments, both in Guernsey and England.



Louise Donadieu

Strategic Marketing Consultant at Avidity

Louise is a strategic marketing consultant and runs her own consultancy business, Avidity. She has 10 years' experience in sales and marketing, the majority of which was spent working within the finance sector. A level 7 qualified member of the Chartered Institute of Marketing, Louise specialises in marketing change projects: working with organisations to change the way they think about marketing and creating strategies and plans that truly engage their target audience for increased ROI. Working closely with her clients, she helps and supports organisations to differentiate themselves from their competitors through integrated and multi-channel marketing strategies and helping them to understand what marketing activity generates the most return.

Having worked with organisations across multiple jurisdictions, Louise has a vast amount of experience creating a seamless and powerful group presence in key target markets.

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