The Insurance Institute of London

PFS | CII

Continuing Professional Development Certificate

The impact of digitization on the adviser : client relationship

Date: Thursday 18 January 2018 **Time:** 1.15pm - 2.00pm

Speaker: Clive Grinyer, Customer Experience Director, Barclays

In this IIL lecture Clive discussed what clients expect as their 'digital experience' for Investment and Pension products. Clive concluded with his thoughts on how the digital revolution will impact on the 'Adviser:Client' relationship by 2020.

The digitalization of customer engagement is a timely reminder that change is constant. As the Adviser landscape continues to evolve, conventional face-to-face relationships are being challenged by mobile and online communications. This lecture considered what lessons can be learnt, and what do these lessons tell us about emerging threats and opportunities. Particularly for Wealth Managers and Private Bankers, what advantages exist from digitalization, with the aim of gaining the critical 'competitive edge' As the pace of digitalization accelerates, business plans require shorter time-scales. Therefore, with 2020 on the horizon, it is vital to consider how this technology will impact on Adviser:Client relationships.

By the end of this lecture members would have gained an insight into:
• Lessons learned from delivering digital product propositions to clients
• Expectations of the future digital experience for Investment & Pension clients
• How these will impact on the Adviser : Client relationship by 2020

CPD | 3/4
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