



# WSBI INNOVATION WORKSHOP SAO PAULO

*Customer Engagement, Data & Partnerships –  
How to get the most out of new technologies?*

21 & 22 March 2019  
Sao Paulo

FOR MORE INFORMATION CONTACT: [INNOVATION@WSBI-ESBG.ORG](mailto:INNOVATION@WSBI-ESBG.ORG)

## WSBI Innovation Workshop Sao Paulo

<b>Programme Overview</b>	
20 March 2019	<p><b>WELCOME DINNER AT BARBACOA ITAIM</b>  <i>Address:</i> R. Dr. Renato Paes de Barros, 65 - Itaim Bibi, São Paulo - SP, 04530-000, Brazil  <b>19.00 – 22.00hrs</b></p>
21 March 2019	<p><b>WSBI INNOVATION WORKSHOP</b>  <i>Address:</i> Espaço JK, International Plaza - Av. Pres. Juscelino Kubitschek, 1327 - Itaim Bibi, São Paulo, 04543-011, Brazil  <b>9.00 – 16.00hrs</b></p>
	<p><b>STUDY VISIT TO BRADESCO'S INOVABRA HABITAT</b>  <i>Address:</i> Av. Angélica, 2529 - Bela Vista, São Paulo - SP, 01227-200, Brazil  <b>16.30 – 18.00hrs</b> (timing tbc)</p>
22 March 2019	<p><b>GRULAC STEERING COMMITTEE</b> (members exclusive)  <i>Address:</i> Espaço JK, International Plaza - Av. Pres. Juscelino Kubitschek, 1327 - Itaim Bibi, São Paulo, 04543-011, Brazil  <b>9.00 – 13.00hrs</b></p>

**Join us for the Innovation Workshop in Sao Paulo**, home of a highly active financial sector and the biggest in the Latin America and Caribbean region. Brazil also ranks as the largest Fintech (Financial Technology) hub of Latin America, after the birth of over 188 new start-ups active in Fintech in the past months. Innovation in banking and the FinTech ecosystem in Brazil is driven by strong growth in the segments of Digital Banking, Trading and Capital Markets, Loans and Insurance. Key Workshop topics will include how to take the best from new technologies and set up useful collaborations to deepen the customer relationship, build customer centricity & engagement. The workshop will also feature a deep dive session on digital onboarding & authentication, and much more. What to expect? Read more about previous events [here](#) (Brussels) & [here](#) (Hong Kong).

**Further information (registration, hotel) on the website:** <https://www.wsbi-esbg.org/Events/São%20Paulo>

# WSBI Innovation Workshop – Sao Paulo

21 March 2019  
9.00 – 16.00 hrs

Venue: Espaço JK, International Plaza - Av. Pres. Juscelino Kubitschek, 1327 - Itaim Bibi, São Paulo, 04543-011, Brazil

Moderated by  
**Aimée Suarez**, WSBI

**From 8.00 Registration & Networking Coffee**

**9.00 – 9.30 Opening & Welcome**

**Opening by Diego Prieto, GRULAC Chairman and President of Banco Caja Social (Colombia)**

**Introduction to the Day & Setting the Scene – Natalie Staniewicz, WSBI**

**9.30 – 10.15 Leveraging open innovation and data to improve customer experience**

*Digital journey, outcome and learnings, insights into data (AI, analytics, data management...) and open innovation programmes*

– Mr. Alexandre Riccio, VP and Director of Investors Relations, Banco Inter

*Following a Guided Exchange on Participants' Experiences and Best Practices (+/-15 minutes)*

**10.15 – 11.00 From disruption to collaboration, fostering collaboration between banks and Fintech Start-ups to remain customer centric**

*Going beyond the pitching stage, overcoming hurdles, how to foster collaboration and make it happen?*

– José Flavio P., Founder Nuveo Digital Transformation Specialists

*Following a Guided Exchange on Participants' Experiences and Best Practices (+/-15 minutes)*

**11.00 – 11.25 Coffee Break**

**11.25 – 11.35 Regulatory snapshot: policy perspective on regulation fostering innovation and financial technology**

– Aimée Suarez, Senior Adviser, International and Institutional Relations **WSBI**

### 11.35 – 12.45 Breakout Session: Workgroup Discussions

Participants will split into workgroups and will be given a specific disruption area / business segment to discuss in depth – which trends are affecting banking, challenges that need to be overcome for innovation to thrive and steps ahead to provide customers with value-added offers

<b>Roundtable 1:</b>	<b>Roundtable 2:</b>	<b>Roundtable 3:</b>	<b>Roundtable 4:</b>
Bank – Startup Collaboration	Bank – Bank Collaboration	How to develop better customer engagement?	Regulatory: How can Policy foster Innovation?
Facilitated by Ernesto Pacheco, Fedecredito	Facilitated by GRULAC presidency, Diego Prieto Rivera, Banco Caja Social	Facilitated by Strands, Albert Morales	Facilitated by BCEE, Joseph Delhaye

### 12.45 – 13.45 Lunch

#### 13.45 – 14.35 How to create customer engagement and centricity – which services to build for customers and how to get better insights on their needs?

Channels, customer insights and targeting, creating engagement and relevant offers

- Javier Mas, Head of Marketing, **CaixaBank**
- Paulo Bissacot, IT Governance Superintendent, **Banco Original**

Following a Guided Exchange on Participants' Experiences and Best Practices (+/- 15 minutes)

#### 14.35 – 15.50 Deep dive session on digital onboarding and authentication

Reaping new opportunities of digital identity (e-KYC, biometrics) to enable better customer engagement while ensuring a regulatory enabling environment and security

Panel discussion gathering different viewpoints moderated by José Flavio P., Founder **Nuveo Digital Transformation Specialists**

- Joseph Delhaye, Senior Vice President and Head Legal, **BCEE State Savings Bank of Luxembourg**
- Marcus Vinicius de Carvalho, Center for the Prevention of Money Laundering and Terrorist Financing of the General Superintendence (PLDFT/SGE), **Comissão de Valores Mobiliários (Brazilian Securities Exchange Commission)**
- Paulo Felipe de Oliveira Antonio, Architecture Superintendent, **Banco Original**

Following Guided Exchange on Participants' Experiences and Best Practices (+/- 15 minutes)

### 15.50 – 16.00 Wrap-up & Closing