

# COO leaders discuss future proofing their platforms and operations

3.00pm

COO Leaders - Enhancing the Platform to grasp the huge opportunity

- What are the key trends taking place in wealth management globally and especially in Asia, where are the biggest challenges and opportunities, and are you prepared?
- What role will the RM play in the post-pandemic world, and how can his/her relevance and productivity be enhanced to make them more effective and to boost client outcomes and experience?
- How are you balancing off the platform's self-serve capabilities and the clients' need for human connectivity and advice? How important is scalability?
- What is coming next in the world of digital technologies and services that will further enhance the wealth management offering in the region, and how can those improve the proposition?
- How are you making the organisation more agile?
- How are you improving the client experience?
- Can you clearly see how you have monetised your various digital transformations?
- How are you dealing with huge amount of data to manage?
- How can you align both human and digital engagement in a seamless collaboration for the delivery of optimised investment products, ideas and advice for private wealth clients?
- Do the banks and wealth firms know enough about the vital role of data management and analytics and the application of AI and Machine Learning?
- Do you think digital transformations will lead to easier management of compliance?
- What do you think compliance management will look like in the future?
- Is enough being achieved in the field of CLM/CRM to deliver personalisation, relevance, suitability and thereby achieve better levels of client loyalty?
- Is there a sufficiently strategic approach to using digital to improve systems and processes, as well as to help these banks and private wealth management firms better engage with their clients?
- What approaches can market players take to ongoing digital transformation? Should they build, buy, or outsource, and how can they properly assess the providers?
- Who implements the decisions, and is enough being done to ensure the right levels of internal adoption/buy-in, and to make sure that the private clients understand the advantages and can make full use of the new and improved suite of capabilities on offer?

Sonjoy Phukan  
Global Chief Operating Officer  
Bank of Singapore

Carol Chan  
Chief Operating Officer, Asia  
Lombard Odier

Long Doan  
Head of CIB Operations, Asia Pacific  
BNP Paribas

Alan Blanchard  
Head of Business Development  
Apiax

Jeffrey Wong  
COO  
Hywin International  
Webinar Ends

4.00pm