

BOOSTING BUSINESS, POWERING GROWTH

Business models
to bank the
female economy

2016
ANNUAL
SUMMIT

Washington, DC

SUMMIT
AGENDA

Oct. 18-20, 2016



SUMMIT AGENDA

Tuesday, October 18, 2016

12.30 PM – 6.00 PM POLICY FORUM • Lower Level Auditorium

6.00 PM – 7.30 PM OPENING RECEPTION • IFC Lobby

Wednesday, October 19, 2016

8.30 AM – 9.00 AM

CONTINENTAL BREAKFAST & NETWORKING • Lower Level Auditorium

9.00 AM – 9.05 AM OPENING REMARKS • Lower Level Auditorium

JESSICA SCHNABEL, Global Product Head, Banking on Women, IFC

9.05 AM – 9.25 AM SPOTLIGHT SPEAKER • Lower Level Auditorium

JACKIE VANDERBRUG, Managing Director and Investment Strategist, U.S. Trust

9.25 AM – 9.30 AM

INTRODUCTION & LEARNING OBJECTIVES • Lower Level Auditorium

CAREY BOHJANEN, Managing Director, Sustainable Finance Advisory

9.30 AM – 9.45 AM OVERVIEW OF BEST PRACTICES • Lower Level Auditorium

INEZ MURRAY, Chief Executive Officer, Global Banking Alliance for Women

9.45 AM – 11.00 AM DIGITAL BANKING THAT ENHANCES THE

VALUE PROPOSITION FOR WOMEN • Lower Level Auditorium

Fintech and big data are transforming the financial services sector, but can they transform the value proposition to women customers? Digital finance can radically reduce time and cost to deliver services (finance, information and education); enable connectivity and networking; and employ new data in innovative ways for risk assessment and decision-making, all of which are important for women. Panelists discuss how technology and big data are being leveraged to deliver value to customers, and especially how they can provide solutions to the specific challenges that women entrepreneurs face in accessing financial services.

MODERATOR: PAUL JENKINS, Partner,
McKinsey & Company

PANELISTS: THOMAS DELUCCA, Founder & CEO, AMP Credit Technologies
SHANNON MORAN, Strategy and Data Analyst, Tala
ESRA KIVRAK, SVP, SME Banking and Marketing, Garanti Bank
MATTHEW GAMSER, CEO, SME Finance Forum, IFC

11.00 AM – 11.30 AM COFFEE & NETWORKING BREAK • Lobby Level Area

11.30 AM – 1.00 PM TRACK I: (PARALLEL SESSION: Spanish/English)

CREATING AN INSURANCE VALUE PROPOSITION FOR WOMEN • Lobby Level L-101

While the insurance industry is expected to earn more than US\$1 trillion from women alone — half of it from just 10 emerging economies — by 2030, insurance companies have largely overlooked women as a key consumer segment. GBA banks are committed to serving women's distinct needs, and just over 50 percent of them have tailored their insurance value proposition to the Women's Market. Using cases from banks and insurance companies, this session explores the most effective product, marketing and operational changes that have been made to tailor the insurance value proposition for women.

MODERATOR: SUSAN HOLLIDAY, Principal Insurance Officer,
Financial Institutions Group, IFC

PANELISTS: DAWN MILLER, Global Head of Business Development, AXA P&C
MARIA GABRIELA MARINE, Marketing Manager,
Banco BHD León
DANIEL GUTIERREZ, VP Business Development,
Banco BHD León

11.30 AM – 1.00 PM TRACK II: (PARALLEL SESSION: English only)

FAST TRACKING DIVERSITY AT THE BANK • Lobby Level L-103

Banks with strong Diversity & Inclusion policies and practices have higher performing Women's Market programs. This session will examine the gamut of experiences, from "behavioral change" interventions at the individual level to structural inclusion policies and practices like leadership quotas at the firm level, using case examples from GBA banks. Participants will develop a common understanding of how to approach the multi-faceted challenges of achieving gender parity in their workplaces.

MODERATOR: ALINA POLONSKAIA, Principal, Leader of Diversity & Inclusion
Executive Networks, Mercer

PANELISTS: SIMA KAMIL, Head of Branch Management, HBL
ROOFI JAMIL, Head of Learning & Development, HBL
JULIE RYNSKI, General Manager, SME Banking &
Connect NOW, Westpac

1.00 PM – 2.30 PM LUNCH & NETWORKING • Lobby Level Area

2.30 PM – 4.00 PM TRACK I: (PARALLEL SESSION: Spanish/English)

EMBEDDING A WOMEN'S MARKET PROGRAM IN THE BANK • Lobby Level L-101

Women's Market programs that fail to achieve their potential do so in large part because of lack of organizational buy-in. Warning signs can include responsibilities being siloed within a single division at the bank, lack of participation by senior management, or a strict focus on marketing without real benefits for the customer. Even with full buy-in, programs can get disrupted when a new CEO or senior manager comes on board. Panelists share their stories so that others can learn.

MODERATOR: ANDREW MCCARTNEY,
Global Banking on Women Specialist, IFC

PANELISTS: TANIA MOUSSALLEM, Chair, Global Banking Alliance
for Women; Assistant General Manager, BLC Bank
MARIA AMINTA QUIRCE, Women's Market Director,
Banco Nacional de Costa Rica
JESSICA LÓPEZ, Executive General Manager, BancoEstado

2.30 PM – 4.00 PM TRACK II: (PARALLEL SESSION: English only)

NON-FINANCIAL SERVICES: MODELS TO MAXIMIZE EFFECTIVENESS • Lobby Level L-103
Non-financial services can be a true differentiator for banks and are integral to serving women well. However, determining what specific services should be prioritized and who should deliver them can be particularly challenging. Using empirical evidence, analytical tools and case studies from banks, panelists will help participants understand what really works for customers, and how to maximize the effectiveness of their non-financial services offer and evaluate its impact to the bank's bottom line.

MODERATOR: SIMLA UNAL, Marketing and Business Development Director, SME Banking, **TEB**

PANELISTS: JANE HOWARD, Managing Director, Branch and Private Banking, **Royal Bank of Scotland**
RAYA YUSUF-SBITANY, Division Head of Department, Business Development, **Bank of Palestine**
JAVIER SANCHO, Head of SMEs, **Banco de América Central**

4.00 PM – 4.30 PM NETWORKING BREAK • Lower Level Auditorium

4.30 PM – 5.30 PM (SMALL GROUPS)

MEET THE BANKS • Lower Level Auditorium

Participants will have the opportunity to engage with expert practitioners from GBA banks and discuss the challenges and opportunities they are facing with their Women's Market programs.

5.30 PM – 5.45 PM SUMMARY & WRAP UP • Lower Level Auditorium

CAREY BOHJANEN, Managing Director, Sustainable Finance Advisory

6.30 PM – 9.30 PM

GALA DINNER & GBA AWARDS • Organization of American States

MARCOS BRUJIS, Global Director, Financial Institutions Group, IFC

TANIA MOUSSALLEM, Chair, Global Banking Alliance for Women;
Assistant General Manager, BLC Bank

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#GBASummit
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Thursday, October 20, 2016

8.30 AM – 9.00 AM

CONTINENTAL BREAKFAST & NETWORKING • Lower Level Auditorium

9.00 AM – 9.15 AM

WELCOME REMARKS & SESSION OBJECTIVES • Lower Level Auditorium

JESSICA SCHNABEL, Global Product Head, Banking on Women, IFC

CAREY BOHJANEN, Managing Director, Sustainable Finance Advisory

9.15 AM – 10.30 AM

**SUPPORTING THE BUSINESS LIFE-CYCLE NEEDS OF WOMEN ENTREPRENEURS:
WORKING WITH PLAYERS IN THE SME ECOSYSTEM** • Lower Level Auditorium

Small and medium businesses have different financing strategies at different points of their development. Women-owned businesses, in particular, face unique challenges during each stage, as they tend to be undercapitalized, particularly in the start-up phase, they are concentrated in often perceived “low-growth” sectors, and many tend to intertwine business with family. This panel explores the innovative ways that banks are supporting women-owned businesses beyond lending, and the role that different ecosystem actors can play in supporting growth throughout their life-cycles. Panelists will explore the collaborative role that banks and other actors in the SME ecosystem can play in meeting the needs of women business owners at the different stages of development.

MODERATOR: PETER TROPPER, Senior Advisor, Emerging Markets Private Equity Association; Former Chief Investment Officer, IFC Private Equity Group; Former Head, IFC SME Ventures

PANELISTS: ALICIA ROBB, Senior Fellow, Kauffman Foundation

BETH MARCELLO, Director, Women Business Development, PNC Bank

JULIE RYNSKI, General Manager, SME Banking & Connect NOW, Westpac

NAZEEM MARTIN, Entrepreneur and SME Consultant, Former Managing Director, Business Partners Ltd.

10.30 AM – 11.00 AM NETWORKING BREAK • Lower Level Auditorium

11.00 AM – 12.00 PM 2020 VISION • Lower Level Auditorium

Leaders share their vision for game-changing strategies to improve women’s economic empowerment.

MODERATOR: TANIA MOUSSALLEM, Chair, Global Banking Alliance for Women; Assistant General Manager, BLC Bank

PANELISTS: MOSUN BELO-OLUSOGA, Chairman, Access Bank Plc
SHARMILA HARDI, Senior Manager, Financial Institutions Group, IFC

JULIE T. KATZMAN, Executive Vice President/COO, Inter-American Development Bank

12.00 PM – 12.15 PM SUMMARY & WRAP UP • Lower Level Auditorium

CAREY BOHJANEN, Managing Director, Sustainable Finance Advisory

12.15 PM – 12.30 PM CLOSING REMARKS • Lower Level Auditorium

JESSICA SCHNABEL, Global Product Head, Banking on Women, IFC

INEZ MURRAY, Chief Executive Officer, Global Banking Alliance for Women

GBA MEMBERS MEETING

12.30 PM – 1.30 PM LUNCH & NETWORKING • Lobby Level Area

1.30 PM – 1.40 PM WELCOME REMARKS • Lobby Level L-101
TANIA MOUSSALLEM, Chair, Global Banking Alliance for Women;
Assistant General Manager, BLC Bank

1.40 PM – 1.45 PM SESSION OBJECTIVES • Lobby Level L-101
CAREY BOHJANEN, Managing Director, Sustainable Finance Advisory

1.45 PM – 2.15 PM

ALLIANCE GROWTH & IMPACT: KEY STRATEGIC IMPERATIVES • Lobby Level L-101
GBA Strategy:

INEZ MURRAY, Chief Executive Officer, Global Banking Alliance for Women

GBA Network Performance:

REBECCA RUF, Vice President, Programs, Global Banking Alliance for Women

2.15 PM – 3.15 PM (SMALL GROUPS)

MAXIMIZING MEMBER INVOLVEMENT • Lobby Level Rooms

GBA is unique because its members support one another's efforts to grow their reach and impact. The GBA secretariat seeks to catalyze that exchange and to codify the knowledge created to further benefit members and to attract new members. This session will help GBA refine and expand member services in two areas — data analytics and insurance — as well as help define the GBA's strategy for Africa.

3.15 PM – 3.30 PM REPORT BACK TO PLENARY • Lobby Level L-101

3.30 PM – 3.40 PM SUMMARY & WRAP UP • Lobby Level L-101
CAREY BOHJANEN, Managing Director, Sustainable Finance Advisory

3.40 PM – 4.00 PM CLOSING REMARKS • Lobby Level L-101
INEZ MURRAY, Chief Executive Officer, Global Banking Alliance for Women

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