WHY? SUMMITS

LONDON 2026

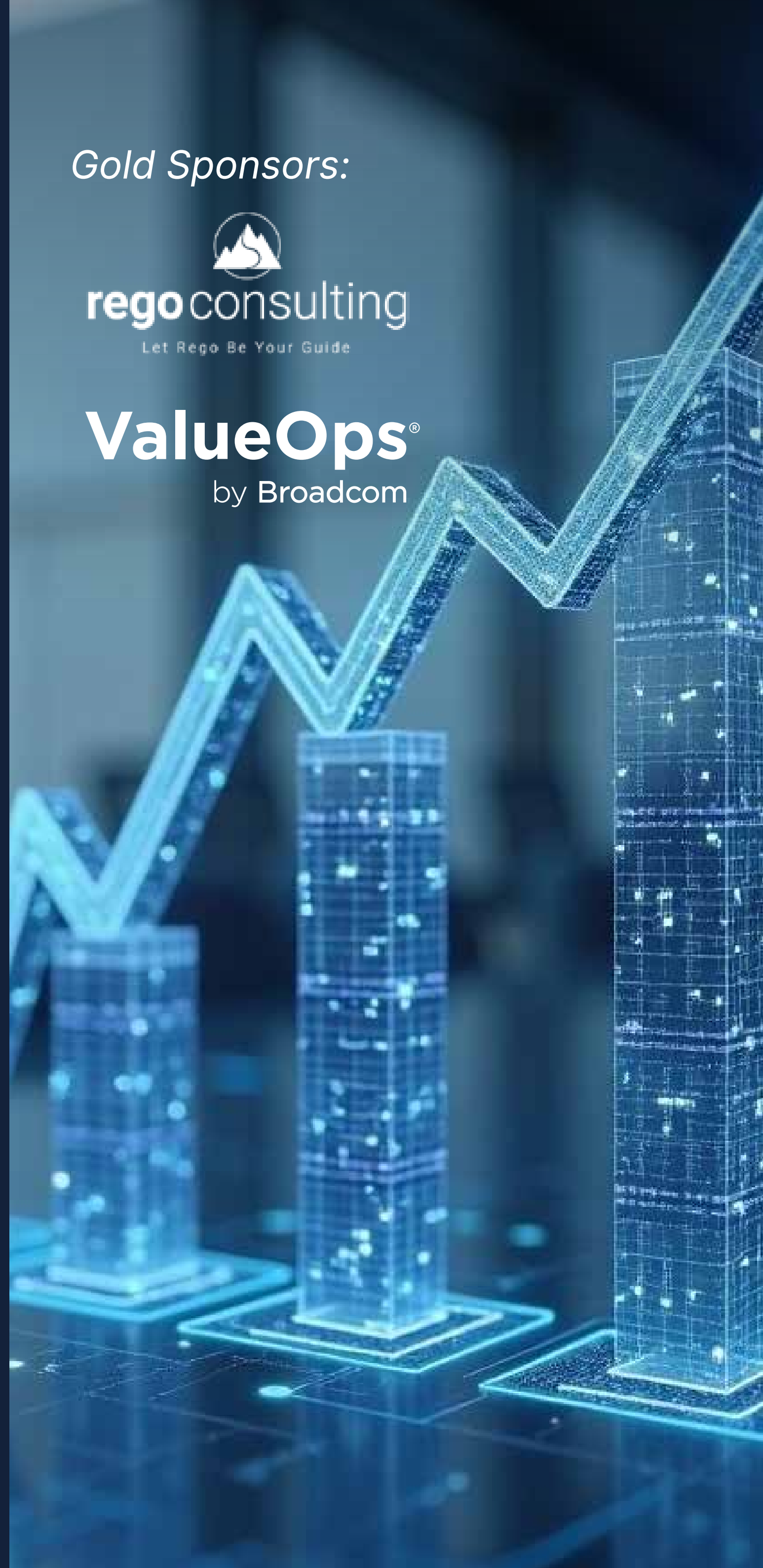
Strategic PPM in Financial Services Summit

Aligning regulatory, digital, data, and AI investments with measurable value

2026
May 12-13

United Kingdom
London

Hilton London Olympia
380 Kensington High Street,
London W14 8NL,
United Kingdom



INVITATION TO THE SUMMIT

Dear Colleagues,

The financial services world is navigating a landscape marked by rapid transformation and increasing complexity. Regulatory demands grow alongside digital innovation, AI adoption, and the need for operational resilience. In such times, true strength comes not from isolated efforts, but from disciplined collaboration and strategic leadership at every level.

You are the leaders who shape the future of finance; not only by managing projects and programs but by forging the portfolios that sustain markets, safeguard trust, and drive sustainable growth. Your work impacts clients, economies, and communities across borders, powering the global financial system.

As protectionist sentiments and regulatory pressures rise, the financial industry must unite around a clear vision: value-driven, transparent, and compliant portfolios that balance innovation with risk management. Access to global markets, responsible innovation, and mutual economic commitment are the foundations of a resilient financial ecosystem.

With this in mind, you are invited to join us in London for the Strategic Portfolio Management in Financial Services Summit. This event gathers portfolio leaders, risk and compliance specialists, technology experts, and business strategists to collaborate on mastering governance, boosting execution capability, and delivering measurable value across regulatory, digital, data, and AI initiatives.

When we come together to share insights, tools, and success stories, we do more than advance business goals; we strengthen the financial infrastructure that underpins global prosperity.

Join us in London as we connect, collaborate, and lead the transformation toward smarter, more disciplined portfolio management in financial services. Together, let's shape the future of banking and finance with integrity, innovation, and impact.

Tania Jadhav

Conference Producer, Why Summits

ABOUT THE SUMMIT

Strategic PPM in Financial Services brings together portfolio leaders, transformation executives, risk, IT, and solution providers to answer one question:

"How do we build a value-driven, regulator-proof, execution-realistic change portfolio that our ExCo, our supervisors, and our customers can trust? "

CONFERENCE OVERVIEW

Financial institutions in London and across Europe face a complex landscape of transformation demands, including core system replacements, digital innovation, AI adoption, regulatory pressures, and operational resilience. This conference unites portfolio leaders, transformation executives, risk managers, and technology specialists to explore how disciplined Strategic Portfolio Management can serve as core infrastructure to drive value, balance regulatory requirements, and ensure execution reality. The event focuses on building a unified, transparent portfolio that delivers predictable benefits and earns trust from executives, regulators, and customers alike.

CONFERENCE OBJECTIVES

This conference is designed to equip financial services professionals with actionable strategies, frameworks, and tools to master Strategic Portfolio Management across their regulatory, digital, data, and AI initiatives. Through real-world case studies, expert keynotes, and interactive sessions, attendees will learn how to:

- Integrate diverse initiatives into a single portfolio view for better decision-making
- Balance regulatory mandates with strategic transformation efforts
- Manage capacity, dependencies, and delivery risks across complex programs
- Track and communicate benefits effectively to stakeholders and boards
- Embed a culture of change adoption to ensure transformation delivers frontline impact

KEY TOPICS

- **Unified portfolio view** across business, tech, risk, and finance
- **Regulatory + strategic balance** instead of regulation suffocating innovation
- **Core/digital transformation governance**
- **Data & AI as structured investments,** not scattered pilots
- **Capacity and dependency management** so portfolios are deliverable
- **Benefits realization & value storytelling** for boards and regulators
- **Culture & change enablement** so value shows up in P&L and customer metrics

ABOUT THE SUMMIT

WHO SHOULD ATTEND

This summit is tailored for senior professionals responsible for shaping and delivering strategic portfolio outcomes in financial services, including:

- VPs, Directors, and Heads of Portfolio Management Office (PMO), Capital Requirements, Digital Transformation, Strategy, and Innovation
- Portfolio and Program Leaders managing regulatory, digital, data, and AI investments
- Risk, Compliance, and Regulatory Affairs Heads overseeing mandatory change portfolios
- Technology and Data Leaders accountable for digital banking, AI/ML, and infrastructure portfolios
- Business Line Executives driving multi-entity or group-level portfolio prioritization and governance
- Transformation and Change Management Executives coordinating cross-functional delivery and adoption
- Senior consultants, solution providers, and vendors supporting portfolio governance and enabling tools

This event is designed to bring together the diverse leadership and specialist roles that collaboratively enable strategic alignment, prioritization, delivery, and benefits realization essential to modern financial institution portfolios.

KEY CHALLENGES ADDRESSED

- Overcoming fragmented and siloed initiatives that waste resources and create oversight risks
- Navigating regulatory complexities while maintaining innovation momentum
- Managing vast digital and AI investments with clear value measurement and risk controls
- Aligning multi-stakeholder portfolios across risk, IT, finance, and business lines
- Ensuring portfolios remain deliverable and responsive to organizational capacity limits

CONFIRMED SPEAKERS

Parinita Kothari
Engineering Lead
Lloyds Banking Group

Gaurav Bansal
Delivery Director - BCBS239 Compliance
Bank of Ireland

Joanne Biggadike
Head of Data Governance
Schroders

Stefano Corradino
Head of Group PMO
Sella

Minh Girey
Chief Data Officer
Bpifrance

Ramy Erfan
Vice President, Business & Technology Enablement
Citi

Angus Moir
Interim Head of Data Management
Bank of England

Stuart McIntyre
Executive Director, Digital Strategy & Operations
Standard Chartered

Lawrence Samson
Global Head of Wealth Data and AI - One Wealth Programme
HSBC

Heli Khandelia
Head of Strategic Change
Pictet Asset Management

Nashwa Saleh
INED, CDir, Finance & Fintech Ambassador, UK IoD Surrey
United Bank for Africa (UK) Ltd

Amit Arora
Global Programme Director ISO20022
HSBC

Srijeet Dash
Senior Vice President - Global Product Commercialization Dom & XB Payments
Citi

IN THE CHAIR

Tina Salvage
Senior Data & AI Governance consultant
Ominiadigital

Kam Helaith
Global Product Strategist
Broadcom

Inge Reuling
Head of Portfolio and Valuation Model Validation
KfW

Helga Laing
Portfolio Management Office (PMO) Lead
Tokio Marine Kiln

Ben Raper
Principal Consultant - Clarity / Value Ops
Rego Consulting

Avinash Shamdasani
Former Global Head of Trade and Transaction Reporting
BGC Group

CONFERENCE AGENDA

DAY 1

17:30 **MEET & GREET**

GET A HEAD START ON NETWORKING!

Kick off the experience with early registration and a relaxed networking session over drinks! As delegates start arriving, this is the perfect opportunity to connect, catch up with familiar faces, and meet new industry peers.

Whether it's handshakes, conversations, or shared laughs, we invite you to join us in setting the stage for an inspiring event. Cheers to new connections and meaningful discussions!

8:30 **REGISTRATION AND WELCOME COFFEE**

9:00 **CHAIRMANS OPENING ADDRESS**

Tina Salvage, *Senior Data & AI Governance consultant,* **Ominiadigital**

9:10 **MEET YOUR PEERS**

Share Your Priorities, and Set Your Objectives

A short, structured icebreaker session designed to help delegates connect early, promote networking, share their priorities, and start the conference with more relevant conversations.

- Why are you attending the conference?
- What are your main challanges in PPM?
- What do you want to learn about or take away?

BLOCK 1: LEADERSHIP PLENARY: PPM AS CORE FINANCIAL INFRASTRUCTURE

9:30 **KEYNOTE**

FROM PROJECT CHAOS TO FINANCIAL CONTROL: WHY PPM IS NOW CORE INFRASTRUCTURE

Financial institutions are not short of initiative - they are short of discipline. Core replacements, digital channels, AI, ESG, cyber, resilience, new regulations: all competing for the same people, budget, and executive attention. With 60 to 70 percent of major transformations failing to fully meet their objectives, and many organizations are still unable to credibly track benefits, the cost of unmanaged change has become a balance sheet issue, not an IT problem.

PPM is not a reporting function; it is core infrastructure for ROE, loss ratio, cost-income, resilience, and regulatory trust.

- How unchecked "project inflation" silently erodes ROE and cost-income.
- Why do regulators, boards, and rating agencies increasingly expect a defensible change portfolio.
- **Lessons from failed transformations:** missing benefits management, weak governance, no single source of truth.
- **What high-maturity institutions do differently:**
  - central intake and prioritization
  - explicit regulatory vs strategic capacity
  - portfolio-level benefits tracking, not slideware

Stefano Corradino, *Head of Group PMO,* **Sella**

10:00 **CASE STUDY**

Top Project Portfolio Management (PPM) Trends for 2026

Ben Raper, *Principal Consultant – Clarity / Value Ops,* **Rego Consulting**

10:30 **PANEL DISCUSSION**

INSIDE THE PORTFOLIO ENGINE ROOM: HOW WE TURN STRATEGY INTO A DELIVERABLE CHANGE ROADMAP

This panel goes under the hood. No vision talk - only how real portfolio leaders structure demand intake, kill pet projects, protect regulatory commitments, and keep delivery teams sane.

- **How intake really works:**
  - who is allowed to propose
  - what information is mandatory
  - how they stop the funnel from exploding.
  - **- Prioritization in practice:**
  - balancing "must do" regulatory work with digital and AI investments
  - dealing with Group vs local entity conflicts.
- Techniques to kill or merge low-value projects without internal war.
- Managing capacity and dependencies:
  - one view of scarce squads, architects, compliance reviewers, vendors.
- **What data they show ExCo monthly:**
  - 5 to 10 metrics that changed decisions, not just RAG status.
- One thing they would change tomorrow is how their institution runs the portfolio.

Angus Moir, *Interim Head of Data Management,* **Bank of England**
Heli Khandelia, *Head of Strategic Change,* **Pictet Asset Management**
Srijeet Dash, *Senior Vice President - Global Product Commercialization Dom & XB Payments,* **Citi**

CONFERENCE AGENDA

DAY 1

11:00 **NETWORKING COFFEE BREAK**

BLOCK 2: REGULATORY & RISK PORTFOLIO LANE: OWNING THE NON-NEGOTIABLE

11:30 **KEYNOTE**

OWNING THE NON-NEGOTIABLE: RUNNING REGULATORY CHANGE AS A STRATEGIC PORTFOLIO

Regulation isn't a series of fire drills; it's a permanent portfolio. This keynote shows how leading institutions turn scattered AML, KYC, sanctions, ESG, cyber and resilience projects into one governed lane that hits deadlines, cuts duplication, and protects capacity for strategic change.

- Why fragmented regulatory projects waste money and create gaps
- How to design a dedicated regulatory portfolio lane (intake, ownership, decision rights)
- Shared components across AML/KYC/sanctions/ESG to avoid rework
- Linking initiatives to clear risk reduction and supervisory expectations
- Keeping room for digital & AI while never missing a rule

Gaurav Bansal, *Delivery Director - BCBS239 Compliance,* **Bank of Ireland**

12:00 **PANEL DISCUSSION**

MAKING MANDATORY CHANGE WORK: INSIDE THE REGULATORY PORTFOLIO

Portfolio, risk, AML and regulatory change leaders discuss how they manage mandatory initiatives without exhausting teams or killing innovation.

- Criteria for what enters the central regulatory portfolio
- Consolidating overlapping AML/KYC/sanctions/ESG work
- Prioritizing when everything is urgent
- Coordinating risk, compliance, IT and business owners
- Using tools for visibility, auditability and capacity management
- How a strong regulatory lane frees capacity for strategic projects

Gaurav Bansal, *Delivery Director - BCBS239 Compliance,* **Bank of Ireland**
Nashwa Saleh, *INED, CDir, Finance & Fintech Ambassador, UK IoD Surrey,* **United Bank for Africa (UK) Ltd**
Avinash Shamdasani, *Former Global Head of Trade and Transaction Reporting,* **BGC Group**

12:30 **NETWORKING LUNCH BREAK**

BLOCK 3: CORE & DIGITAL TRANSFORMATION: RUNNING BIG BETS AS A PORTFOLIO

13:30 **KEYNOTE**

DE-RISKING CORE TRANSFORMATION: RUNNING BIG BETS AS A PORTFOLIO, NOT A MONSTER

Core banking, payments, and claims transformations are too big to run as single hero projects. This keynote shows how leading institutions break them into a governed portfolio of increments that protect customers, manage vendors, and deliver value step by step.

- Why one-shot core replacements overrun and damage trust
- Structuring core, channels, data, and payments as a sequenced portfolio
- Clear decision gates, dependencies, and rollback options
- Aligning vendors, SIs, and internal teams under one portfolio model
- Proving value at each release, not only at the end

Helga Laing, *Portfolio Management Office (PMO) Lead,* **Tokio Marine Kiln**

14:00 **PANEL DISCUSSION**

INSIDE LARGE-SCALE TRANSFORMATION: MAKING CORE, DIGITAL, AND DATA DELIVERABLE

Transformation directors, heads of architecture, portfolio leads, and vendor partners discuss how they keep multi-year programs executable and aligned.

- How they prioritise and phase core, payments, channels, and data work
- Coordinating multiple vendors under one portfolio and contract framework
- Managing dependencies on legacy, integration, security, and operations
- Avoiding change fatigue in branches, contact centers, and ops teams
- What they measure monthly to keep ExCo support and avoid surprises

Ramy Erfan, *Vice President, Business & Technology Enablement,* **Citi**
Angus Moir, *Interim Head of Data Management,* **Bank of England**
Parinita Kothari, *Engineering Lead,* **Lloyds Banking Group**

BLOCK 4: INTERACTIVE SESSIONS: PRIORITISATION, DASHBOARDS & REGULATORY LANE

14:30 **PARALLEL WORKSHOPS**

WORKSHOP A: BUILDING A PRIORITISATION MODEL WHEN EVERYTHING IS "CRITICAL"

Hands-on session to design a simple, defensible scoring model for initiatives across regulatory, risk, digital, data, and AI.

- Define 6–8 criteria that link directly to ROE, cost-income, risk, and customers
- Weight regulatory vs strategic vs efficiency projects without politics
- Test the model on 3–4 sample initiatives and see how the ranking changes

Helga Laing, *Portfolio Management Office (PMO) Lead,* **Tokio Marine Kiln**

CONFERENCE AGENDA

DAY 1

WORKSHOP B: PORTFOLIO DASHBOARDS YOUR EXCO WILL ACTUALLY USE

Participants sketch a one-page portfolio view that replaces 40-slide packs and makes decision-making unavoidable.

- Select the essential KPIs and visuals (no RAG wallpaper)
- Combine financials, risk, capacity, and benefits on a single page
- Discuss data sources and ownership so the dashboard stays trusted and live

Stefano Corradino, *Head of Group PMO,* **Sella**

WORKSHOP C: Strategic Resource Management: Aligning Capacity to What Matters Most

Ben Raper, *Principal Consultant – Clarity / Value Ops,* **Rego Consulting**

15:30 **NETWORKING COFFEE BREAK**

16:00 **ROUNDTABLE DISCUSSIONS**

1. Prioritizing When Everything Is "Critical"

Everyone has 50 "must-do" initiatives. This roundtable explores how institutions really decide: which criteria they use, how they score regulatory vs strategic work, how they deal with politics, and how they communicate tough trade-offs without derailing relationships.

Avinash Shamdasani, *Former Global Head of Trade and Transaction Reporting,* **BGC Group**

2. Group vs Local Portfolios in Multi-Entity Banks

How do you run one coherent change agenda across multiple countries, brands, and regulators without killing local agility? Participants compare models for demand intake, funding, decision rights, and escalation between Group, regional, and local entities.

Lawrence Samson, *Global Head of Wealth Data and AI - One Wealth Programme,* **HSBC**

3. Designing a Portfolio Board Your ExCo Respects

What does an effective portfolio board look like in practice? This session focuses on membership, cadence, decision rights, and the minimal set of metrics and visuals that make senior executives engage, challenge, and decide, rather than just "take note."

Helga Laing, *Portfolio Management Office (PMO) Lead,* **Tokio Marine Kiln**

16:45 **CHAIRMANS DAY 1 CLOSING REMARKS**

16:50 **INFORMAL NETWORKING**

17:30 **END OF DAY 1**

CONFERENCE AGENDA

DAY 2

BLOCK 5: DATA, ANALYTICS & AI: A PORTFOLIO OF STRATEGIC BETS

9:00 KEYNOTE

BETTING ON THE RIGHT ALGORITHMS: RUNNING DATA & AI AS A STRATEGIC PORTFOLIO

AI use cases in fraud, credit, pricing, and CX are exploding, but most remain pilots with unclear value and rising model risk. This keynote shows how leading institutions treat data and AI as a governed portfolio of bets – funded, prioritized, and challenged with the same rigor as any major program.

- Selecting AI use cases with clear P&L and risk impact
- Applying portfolio criteria: value, feasibility, data readiness, compliance
- Building shared data and MLOps foundations instead of one-off experiments
- Meeting expectations on explainability, fairness, and model risk management
- Killing weak use cases fast and doubling down on winners

Ramy Erfan, *Vice President, Business & Technology Enablement,* **Citi**

9:30 KEYNOTE

From Phantom AI Expenditure to Measurable ROI

Objective: Discuss a portfolio-driven approach to aligning AI investments with business impact.

Discussion Points: We will highlight common pitfalls in achieving AI ROI and outline building blocks for a measurable AI portfolio—covering value demonstration, cost management, and resource allocation. We will also explore how ValueOps provides the framework for these objectives.

Kam Helaith, *Global Product Strategist,* **Broadcom**

10:00 PANEL DISCUSSION

DATA, AI & MODEL RISK: MAKING SMART BETS UNDER SUPERVISION

Portfolio, data, analytics, and model risk leaders discuss how to invest in AI confidently without losing control.

- Who owns the AI portfolio and how use cases are prioritised
- Balancing innovation with model risk, explainability, and regulatory scrutiny
- Ensuring data quality, lineage, and governance at portfolio level
- Integrating AI programs with PPM tools and enterprise architecture
- How they decide which AI projects to scale, pause, or stop

Joanne Biggadike, *Head of Data Governance,* **Schroders**
Stefano Corradino, *Head of Group PMO,* **Sella**
Ramy Erfan, *Vice President, Business & Technology Enablement,* **Citi**
Stuart McIntyre, *Executive Director, Digital Strategy & Operations,* **Standard Chartered**
Lawrence Samson, *Global Head of Wealth Data and AI - One Wealth Programme,* **HSBC**

10:30 NETWORKING COFFEE BREAK

BLOCK 6: CAPACITY, DEPENDENCIES & DELIVERY RISK: BUILDING A DELIVERABLE PORTFOLIO

11:00 KEYNOTE

SEEING THE REAL LIMIT: MANAGING CAPACITY, DEPENDENCIES & DELIVERY RISK AT PORTFOLIO LEVEL

Most failures are not strategy problems; they are capacity and dependency blind spots. This keynote shows how leading institutions build a single, honest view of people, vendors, platforms, and change collisions—so approved portfolios are actually deliverable.

- **One view of critical capacity:** IT, data, risk, compliance, ops, vendors
- **Spotting collisions:** 5 programs hitting the same platform/team at once
- Linking capacity, risk, and prioritisation: what not to start
- Simple practices for forecasting delivery risk at portfolio level
- How to talk to ExCo about “we can’t do all this” with data, not drama

Angus Moir, *Interim Head of Data Management,* **Bank of England**

BLOCK 7: CHANGE ADOPTION & FRONTLINE REALITY: MAKING TRANSFORMATION STICK

11:30 KEYNOTE

WHEN DELIVERY ISN’T ADOPTION: PUTTING CHANGE AT THE HEART OF THE PORTFOLIO

Most portfolios declare success at go-live, while branches, brokers, underwriters and operations quietly stay on old ways of working. This keynote shows how leading institutions bake change adoption into portfolio design, so every strategic initiative lands in the frontline and in the numbers.

- Why so many “successful” projects fail in practice
- Treating change, training, comms and incentives as core scope, not extras
- Measuring adoption with simple, hard metrics (usage, NPS, STP, error rates)
- How to design initiatives with frontline input from day one
- Building a culture where people are not victims of change, but partners in it

Minh Girey, *Chief Data Officer,* **Bpifrance**

12:00 PANEL DISCUSSION

FROM POWERPOINT TO PRACTICE: MAKING CHANGE STICK IN BRANCHES AND OPERATIONS

Operations leaders, PPM heads, HR/learning, and change specialists discuss how to ensure transformation is actually lived by customer-facing and back-office teams.

- Engaging frontline staff early in design and pilots
- Aligning incentives, KPIs and performance management with new ways of working
- Managing change fatigue across overlapping programs
- Using digital adoption tools and data to see where people struggle
- Examples of what finally moved the needle on real adoption in their institutions

Joanne Biggadike, *Head of Data Governance,* **Schroders**

CONFERENCE AGENDA

DAY 2

Lawrence Samson, *Global Head of Wealth Data and AI - One Wealth Programme,* **HSBC**
Heli Khandelia, *Head of Strategic Change,* **Pictet Asset Management**
Srijeet Dash, *Senior Vice President -Global Product Commercialization Dom & XB Payments,* **Citi**

12:30 **NETWORKING LUNCH BREAK**

BLOCK 8: INTERACTIVE SESSIONS: BENEFITS, KILL CULTURE & ONE PORTFOLIO STORY

13:30 **PARALLEL WORKSHOPS (CHOOSE ONE)**

WORKSHOP A: BENEFITS REALIZATION THAT EXCO AND BOARD WILL SIGN OFF

Hands-on design of a simple, credible benefits framework for strategic, regulatory, digital, data & AI initiatives.

- **Define value categories:** P&L impact, risk reduction, customer, resilience
- Set owners, baselines, and review points for each initiative
- Build a one-page portfolio benefits dashboard (inputs for board packs)

Inge Reuling, *Head of Portfolio and Valuation Model Validation,* **KfW**

WORKSHOP B: THE KILL CLINIC: HOW TO STOP LOW-VALUE PROJECTS WITHOUT STARTING A WAR

Practical techniques and scripts for ending or reshaping initiatives that don't deliver.

- Criteria and triggers for kill/hold/merge decisions
- How to depersonalize decisions and handle senior sponsors
- Planning exits: comms, reallocation of teams, and saving useful assets

WORKSHOP C: MAKING DATA, AI & CHANGE ADOPTION INVESTABLE AS A PORTFOLIO

Turn scattered AI pilots and change efforts into a governed pipeline of bets.

- Map AI and change use cases into a single intake and scoring model
- Prioritize by value, feasibility, model risk, and adoption readiness
- **Define common enablers:** data platforms, MLOps, digital adoption tools

Stuart McIntyre, *Executive Director, Digital Strategy & Operations,* **Standard Chartered**

14:30 **ROUNDTABLE DISCUSSIONS**

1. PROVING VALUE: HOW DO YOU DEMONSTRATE THE IMPACT OF TRANSFORMATION?

Participants share how they link portfolios to ROE, cost-income, loss ratio, risk KPIs, CX, and which metrics actually land with ExCo and regulators.

Inge Reuling, *Head of Portfolio and Valuation Model Validation,* **KfW**

2. KILL CULTURE IN REAL LIFE: WHERE IS YOUR LINE?

Open discussion on when and how institutions have killed or radically reshaped programs; what worked politically, what backfired, and how to protect people while being ruthless on value.

Joanne Biggadike, *Head of Data Governance,* **Schroders**

3. ONE STORY: ALIGNING PMO, RISK & FINANCE ON THE PORTFOLIO NARRATIVE

How to get Portfolio/PMO, Risk, and Finance telling the same story: consistent numbers, shared assumptions, and a unified view of priorities and trade-offs across the bank/insurer.

4. DIGITAL EURO & CBDCS: REWRITING THE RULES OF BANKING AND PAYMENTS

With the rollout of the digital euro by the European Central Bank, banks and payment providers face a potential shift in deposits, revenue models, and customer ownership. Will institutions adapt as distributors and innovators, or risk disintermediation in a central bank-led ecosystem?

15:30 **CHAIRMANS DAY 2 CLOSING REMARKS**

15:35 **NETWORKING COFFEE BREAK**

16:00 **THATS A WRAP**

CONTACT US

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