

**FINANCIAL WORKPLACE**

**NEW YORK W**

# EXPLORE THE FUTURE OF WORK AND THE WORKPLACE

BNY MELLON, 240 GREENWICH ST, NEW YORK

THURSDAY FEBRUARY 16TH

09:00 - 16:15

TWENTY YEARS OF  
**WORKTECH**

**20**

EST. 2003

## EVENT SPONSORS

### HOST PARTNER



### GOLD PLUS SPONSORS



### SILVER SPONSOR



### BRONZE SPONSOR



### SUPPORTED BY





Samantha Cullum

Conference Producer,  
WORKTECH Events

## A warm welcome to Financial Workplace New York

Financial Workplace is the forum for all workplace professionals involved in the future of work and the workplace for the financial sector.

Never before has the workplace, and the way we work been so high on the agenda for organisations. As we make the great return to the office, how can business leaders in the financial services sector build engaging workplace experiences and cultures for their people?

You are invited to join 120+ senior professionals from real estate, facilities, HR, technology, executive management, architecture, design and professional advisors from some of the world's top financial institutions to listen to global thought leaders and share best practice and expertise.

The conference will be run in one stream, which means our delegates will get to attend every speaker presentation. We will also have a curated innovation exhibition happening in the breakout areas for attendees to meet with our education partners, complementing learning throughout the day, as well as three networking breaks, creating time for attendees to meet the other participants.

We hope you will be able to join us and we are looking forward to welcoming you to the event on February 16th.

Warmest regards,  
Samantha

# CONTENTS



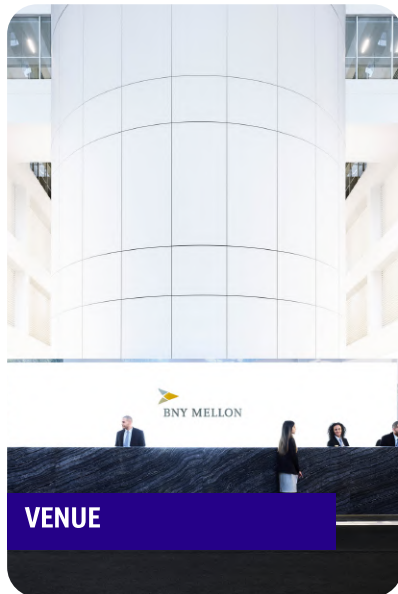
**SPEAKERS**



**SESSIONS**



**CONFERENCE AGENDA**



**VENUE**



**WHO ATTENDS**



**KEY INFORMATION**

# MEET THE SPEAKERS



Financial Workplace New York will attract some of the biggest and brightest names to debate, discuss, and divulge the latest thinking on the future of work and the workplace.

The conference will feature leading international thinkers from industry and academia. Our speakers represent some of the world's biggest brands and best universities and research departments, alongside radical visionaries from new innovative organisations.

Through interdisciplinary speakers and learning experience, we focus on bringing cutting edge ideas and inspiration to the workplace community to enhance creativity and move thinking forward. Instead of focusing on peer to peer innovation through imitation, we aim to curate a unique programme, bringing together experts in the fields of people, place and technology and relevant adjacencies to reflect on the future of work and workplace.

Alongside the conference series, the WORKTECH Academy knowledge hub explores the future of work through six key themes: people, place, technology, design, culture and innovation. Creating leading commentary, research and publications that places scientific research at the heart of key business problems. [www.worktechacademy.com](http://www.worktechacademy.com)

## Full list of speakers

Oppong Agyemang II Envoy  
John Britto JPMorgan Chase & Co.  
Hans Brown BNY Mellon  
Rosamond Cosentino Citi  
Melissa Davis Scotiabank  
Alicia Duncan BNY Mellon  
Gabrielle Fink Formerly HSBC  
Linda Foggie Citi  
Sharadin Graham Robinhood  
Hilary Green Scotiabank  
Phil Kirschner McKinsey & Company  
Grace Lai Morgan Stanley  
Bruce Lerner Zurich Insurance  
Stuart Logan BNY Mellon  
Bobby Magnano JLL  
Ann McNally 4xi Global Consulting  
Peter Miscovich JLL  
Will Monaghan Willis Towers Watson  
Robert Morelli HSBC  
Mark O'Grady Bank of America  
Alejandro Perez BNY Mellon  
Imogen Privett UnWork  
Michael Przytula Accenture  
Philip Ross UnWork  
Meg Swanson Eptura  
Tricia Trester Cresa  
Andrew Umans Modo Labs  
Martin Vergara II Morgan Stanley  
Jenny West Cresa  
Justin Wililams Wells Fargo  
David Xides Inpixon



**John Britto, JPMorgan Chase & Co**



**Alicia Duncan, BNY Mellon**



**Robert Morelli, HSBC**



**Grace Lai, Morgan Stanley**



**Mark O'Grady, Bank of America**



**Hilary Green, Scotiabank**



**Alejandro Perez, BNY Mellon**



**Melissa Davis, Scotiabank**



**Martin Vergara II, Morgan Stanley**

# SESSION HIGHLIGHTS

The future of work and the workplace is on everyone's agenda. This event brings thought leaders together to share cutting edge ideas on the future, from both a people, place, and technology perspective. It will allow an understanding of the key drivers of change and enablers of innovation that will shape how, where and when work takes place.

Key themes we will be discussing at this event include:

## The Future Financial Workplace: Challenges & Emerging Trends

The pandemic has been a catalyst for re-shaping and re-thinking a new world of work. We examine what's on the horizon for the future of work in the financial services sector, looking at how business leaders should respond and what they should prioritize in the months ahead.

## Technology Enabled Workplace Experience

Companies are accelerating plans to invest in new technology, create flexible working environments and make the office a destination. We will examine the latest workplace technologies and innovations that will support workplace experience and the built environment for financial services in 2023 and beyond.

## People-Centered Spaces: Cultivating Culture & Engagement

How can companies make the office an attractive proposition to employees who now have more choice in where and how they work? We discuss the post pandemic impact on work, space, buildings and the effects on employee and company productivity, well-being, behavior, and culture.

### KEY THEMES

THE FUTURE FINANCIAL  
WORKPLACE: CHALLENGES &  
EMERGING TRENDS

TECHNOLOGY ENABLED  
WORKPLACE EXPERIENCE

PEOPLE-CENTERED SPACES:  
CULTIVATING CULTURE &  
ENGAGEMENT



## Unworking: The Reinvention of the Modern Office

Philip Ross, Futurologist & CEO, Cordless Group & UnWork

Over the past hundred years, the office has been integral to the development of modern society. It has shaped the architecture of our cities, the behaviour of our organizations and the everyday movements of millions of people. The global pandemic brought our attendance in the office to an abrupt halt and triggered a complete re-evaluation of the purpose of the workplace. This opening session offers an overview of emerging workplace trends and innovations and explores what happens next, advancing a manifesto for 'unworking' - unlearning old habits and rituals established for an outdated office and creating new ones fit for an age of digital technology, design innovation and diverse workforces.

## Scotiabank Case Study: Predictable Flexibility – Enabling Choice for Everyone

Hilary Green, Director Change Management & Program Lead, Workplace Transformation, Scotiabank / Melissa Davis, Senior Manager Architecture & Design, Design Lead, Scotiabank

In early 2019, Scotiabank's Toronto Contact Center was looking for a change. They had a growing workforce, and an outdated space. In this session, Design Lead Melissa Davis and Change Lead Hilary Green will show you how they approached taking the Toronto Contact Center from a design straight out of 1970 to space that is future proof for years to come.



## Expert Panel: Workplace Experience

Moderator: Ann McNally, Consultant, 4xi Global Consulting / Mark O'Grady, Global Head of Real Estate Operations & Capital Planning, Bank of America / Stuart Logan, Managing Director, Head of Human Resources, Global Operations & Technology, BNY Mellon / Justin Williams, SVP Workplace Services Strategy Lead, Wells Fargo

This session explores how best to create optimal environments for employees to do their work, examining how cross-functional and human-centered approaches can be leveraged to make the office and greater workplace ecosystem more purposeful. How do we measure what is great? How do we successfully work across functional real estate, human resources (HR) and information technology (IT) to deliver it?

## CONFERENCE OPENS

### 09:00 CHAIRPERSON'S OPENING REMARKS & WELCOME ADDRESS

Alicia Duncan, **Global Head of Workspace Transformation for Technology Services, BNY Mellon**

 BNY MELLON

Bobby Magnano, **President of Financial Services, JLL**



### 09:20 OPENING KEYNOTE: UNWORKING: THE REINVENTION OF THE MODERN OFFICE

Philip Ross, **Futurologist & CEO, Cordless Group & UnWork**



The global pandemic brought our attendance in the office to an abrupt halt and triggered a complete re-evaluation of the purpose of the workplace. This opening session offers an overview of emerging workplace trends and innovations and explores what happens next, advancing a manifesto for 'unworking' - unlearning old habits and rituals established for an outdated office and creating new ones fit for an age of digital technology, design innovation and diverse workforces.

### 09:40 FIRESIDE CHAT

Alejandro Perez, **Chief Administrative Officer, BNY Mellon** / Philip Ross, **Futurologist & CEO, Cordless Group & UnWork**

In this fireside chat, leaders Alejandro Perez and Philip Ross will discuss the continued transformation of workplace, examining key drivers of innovation and emerging trends that are shaping the future of work in the financial services sector.

 BNY MELLON 

## 10:10 NETWORKING & COFFEE BREAK

### 10:40 2023 WORKPLACE PREDICTIONS

Meg Swanson, **Chief Marketing Officer, Eptura**



What lies ahead for the workplace in 2023? To succeed, leaders need to understand the policies, practices, and metrics that will most affect the people, places, and assets they manage. This session offers in-depth analysis of today's most pressing trends where we examine imminent state of the workplace in the context of worktech.

### 11:00 EXPERT PANEL: REIMAGINING THE FUTURE FINANCIAL SERVICES WORKPLACE

Moderator: Phil Kirschner, **Senior Expert, Associate Partner, McKinsey & Company** / Robert Morelli, **Head of Corporate Real Estate, USA, HSBC** / Sharadin Graham, **Director of Global Real Estate and Workplace Operations, Robinhood** / Will Monaghan, **Senior Director, Global Head of Real Estate & Workplace Experience, Willis Towers Watson**

In this session, we will examine how financial services employers are innovating their workplace strategies and adopting flexible and remote policies to support evolving working models. Offering varying perspectives from within the financial services sectors, our experts will also discuss obstacles that may impact the ability to innovate and adopt flexible work practices.



## 11:30 LOOKING TO BUILD BETTER WORKPLACE EXPERIENCES? RETHINK YOUR INVESTMENT IN DATA

Oppong Agyemang II, [Strategic Channel and Partnerships Manager, Envoy](#)



Keeping your workplace portfolio agile in any economy requires you to anticipate problems – from building services to employee experience – and to take action in real time. Property managers and their tenants are turning to workplace data for actionable insights. This session will explore the complex job of workplace forecasting, and how a 360-view through analytics can help optimize buildings or standalone offices for security, efficiencies, and great experiences.

## 11:50 EXPERT PANEL: EMERGING TECHNOLOGIES RE-SHAPING THE WAY WE WORK

Moderator: Imogen Privett, [Associate Director, Workplace Innovation & Senior Research Associate, UnWork](#) / Hans Brown, [Global Head of Enterprise Innovation, CIO, BNY Mellon](#) / John Britto, [Executive Director, JPMorgan Chase & Co.](#) / Rosamond Cosentino, [COO, Location & Realty Services, Citi](#)

In the age of the “anywhere office”, technology will play a more vital role than ever. It is now crucial for businesses to leverage data to understand how people are using workspaces and implement technologies that will keep teams connected, organized, safe and ultimately enhance their experience and productivity. Our experts will share how some of the largest and most innovative global companies revolutionize how they use technology to improve their workplace ecosystems and attract and retain talent.



## 12:20 INNOVATION PLATFORM

Tricia Trester, [Head of Client Solutions, Cresa](#) / Jenny West, [Vice President of Workplace & Project Management, Cresa](#)



## 12:25 INNOVATION PLATFORM

David Xides, [Enterprise Account Executive, Inpixon](#)



## 12:30 NETWORKING & LUNCH BREAK

## 1:30 NEW YEAR, NEW CHALLENGES: HOW WORKPLACE ENGAGEMENT APPS BRING EMPLOYEES BACK TO THE OFFICE

Moderator: Andrew Umans, [Vice President, Head of Strategy, Modo Labs](#) / Grace Lai, [Executive Director, Morgan Stanley](#) / Martin Vergara II, [Global Head of Talent Acquisition, Morgan Stanley](#) / Gabrielle Fink, [Workplace Strategist, formerly with HSBC](#)

2023 is a critical year to shape new working norms that make sense for a company’s bottom line and employee productivity and retention. Employers are focusing on employee experience as a way to engage and inspire employees and entice them back into the office. The right digital tools can energize return-to-office RTO initiatives while helping attract and retain the best employees. Session panelists who have successfully implemented workplace app technology to support their RTO programs will share their experiences, lessons learned, and measurements for success. They will also discuss how they used the technology to create moments that matter, and ensure time onsite is productive, collaborative, and more inclusive.



Morgan Stanley

## 14:00 EXPERT PANEL: HYBRID WORKPLACE INTEGRATION: WHAT'S NEXT?

Moderator: Peter Miscovich, **Executive Managing Director, Global Future of Work Leader, JLL** / Michael Przytula, **Managing Director – Intelligent & Digital Workplaces, Accenture** / Bruce Lerner, **North America Head of Corporate Real Estate and Workplace Service, Zurich Insurance** / Linda Foggie, **Managing Director, Global Head of Real Estate Operations, Citi**

Hybrid Workplace Integration continues to evolve for many organizations. In this discussion, we will explore how to improve the Hybrid Employee Workplace Experience and to enable Smart Workplace Technologies within the financial services sector. Hybrid Workplace leading strategies, practices and solutions will be discussed during the panel session.



## 14:35 NETWORKING & COFFEE BREAK

## 15:10 SCOTIABANK CASE STUDY: PREDICTABLE FLEXIBILITY - ENABLING CHOICE FOR EVERYONE

Hilary Green, **Director Change Management & Program Lead, Workplace Transformation, Scotiabank** / Melissa Davis, **Senior Manager Architecture & Design, Workplace Design Lead Scotiabank**

In early 2019, Scotiabank's Toronto Contact Center was looking for a change. They had a growing workforce, and an outdated space. In this session, Design Lead Melissa Davis and Change Lead Hilary Green will show you how they approached taking the Toronto Contact Center from a design straight out of 1970 to space that is future proof for years to come.



## 15:35 CLOSING LEADERSHIP PANEL: WORKPLACE EXPERIENCE

Moderator: Ann McNally, **Consultant, 4xi Global Consulting** / Mark O'Grady, **Global Head of Real Estate Operations & Capital Planning, Bank of America** / Stuart Logan, **Managing Director, Head of Human Resources, Global Operations & Technology, BNY Mellon** / Justin Williams, **SVP Workplace Services Strategy Lead, Wells Fargo**

This session explores how best to create optimal environments for employees to do their work, examining how cross-functional and human-centred approaches can be leveraged to make the office and greater workplace ecosystem more purposeful. How do we measure what is great? How do we successfully work across functional real estate, human resources (HR) and information technology (IT) to deliver it?



## 16:05 CHAIRPERSON'S CLOSING REMARKS

Alicia Duncan, **Global Head of Workspace Transformation for Technology Services, BNY Mellon**

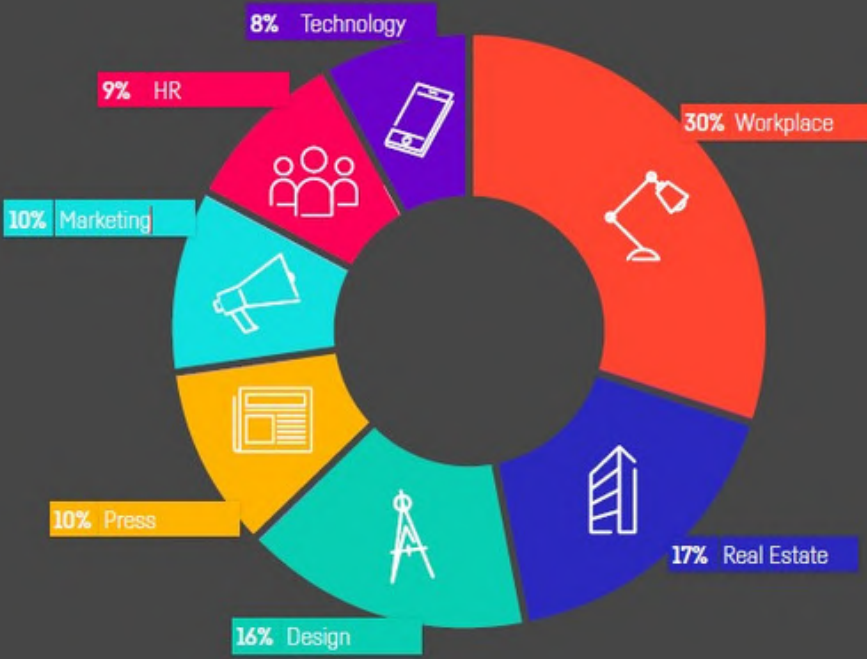


Bobby Magnano, **President of Financial Services, JLL**



## 16:15 CONFERENCE CLOSES

# WHO ATTENDS



A well-spoken and experienced group of presenters providing leading edge subjects current topics and statistics. A great place to learn about new ideas.

WORKTECH DELEGATE, DELOITTE



Informative, interesting views on workplace design, planning technology and workers

WORKTECH DELEGATE, BANK OF MONTREAL



# BOOK NOW

[www.worktechevents.com/events/financial-workplace-23/](http://www.worktechevents.com/events/financial-workplace-23/)

# KEY INFORMATION

## Date

When: Thursday, February 16th 2023

Where: BNY Mellon, 240 Greenwich St, New York

## How to book:

Visit: [www.worktechevents.com/events/financial-workplace-23/](http://www.worktechevents.com/events/financial-workplace-23/)

## Offer a Special Rate to Your Network!

Become a marketing partner for this event and qualify for a special rate for your colleagues, complimentary passes for yourself, logo exposure for your organisation, and more!

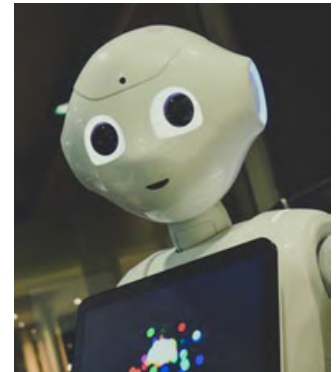
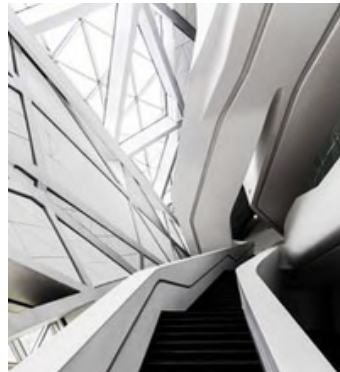
If you are part of a group that would like to attend and are looking for a joint group rate please get in touch to arrange a bespoke ticket price.

## Become a WORKTECH Ambassador

We're looking for people that love the future of work and the workplace and social media. People who are willing to become part of our team and help spread the word to the masses. There will be a free event ticket available to successful applicants.

For more information on the above initiatives, please contact:

[kirsty.darlington@worktechevents.co.uk](mailto:kirsty.darlington@worktechevents.co.uk)



7 St. John's Mews  
13 St. John's Road, Hampton Wick  
Kingston upon Thames, KT1 4AN, UK

+44 (0)20 89 77 89 20  
[info@unwired.eu.com](mailto:info@unwired.eu.com)

[www.worktechevents.com](http://www.worktechevents.com)

