



Customer
Experience for
Financial
Services

April 20 - 21, 2021

Sponsorship Lead Generation Guide



Position Your Brand and Generate Qualified Sales Leads

The 3rd Annual Customer Experience for Financial Services is the only event of its kind. For 2021, we are excited to announce we have gone VIRTUAL with increased value for sponsors!

DEMAND GENERATION

Demand generation
for high quality
SQLs for your sales
pipeline

THOUGHT LEADERSHIP

Demonstrate your
expertise alongside
leading brands

HIGH-LEVEL NETWORKING

Connect with senior
decision-makers from
top brands

BRAND AWARENESS

Engage with
customers to be
top-of-mind

BUILD LOYALTY & CLIENT RETENTION

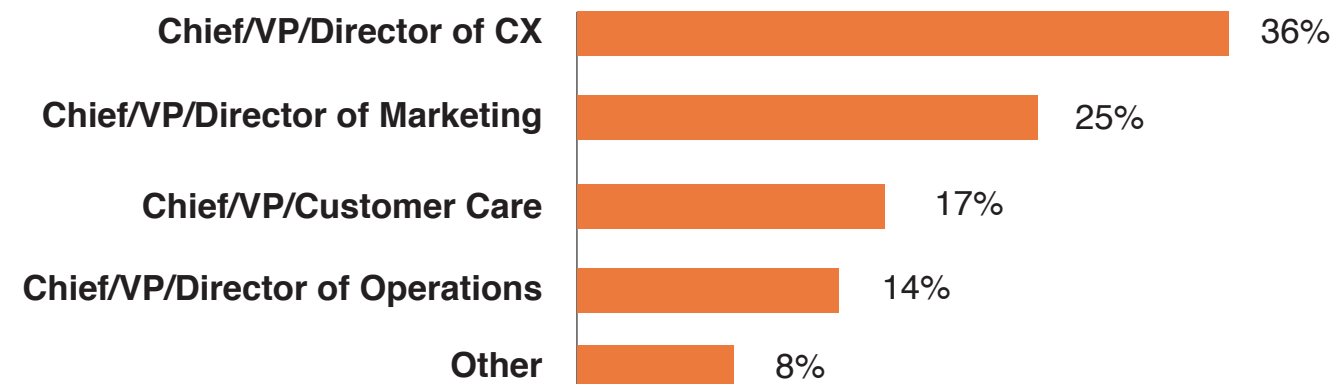
Build and
maintain important
relationships



Connect with Senior Executives Ready to Invest

Join us at this exclusive virtual event to generate high-quality leads that will drive your sales pipeline. Make high impact 1-to-1 connections with senior buyers who are looking for CX solutions over the next 12 months.

TITLES



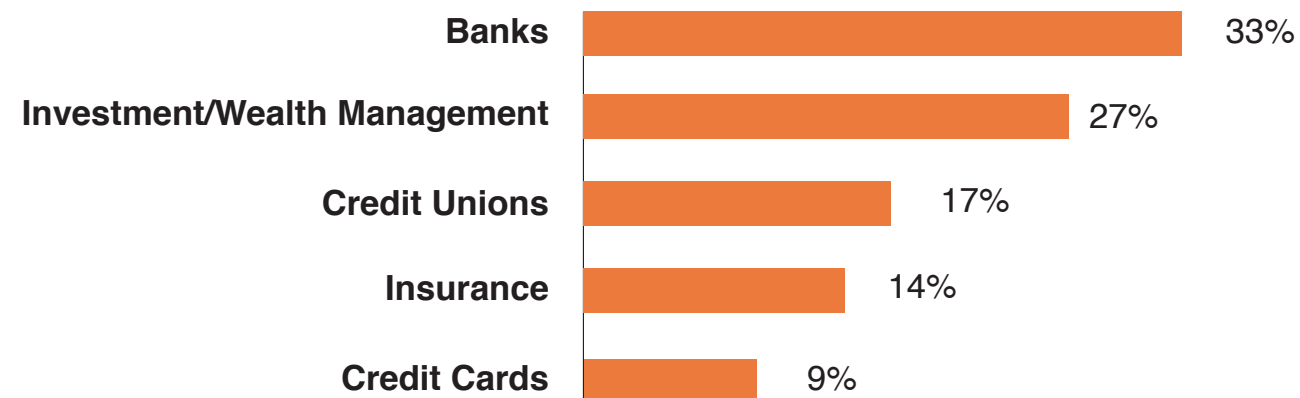
\$1M

Average Attendee Expected
Spend on SaaS Technology

50:1

Sponsor to
Delegate Ratio

INDUSTRIES



10k

Current Database
Community Size

96%

Overall Delegate
Satisfaction

The **ONLY** Customer Experience event focused on the Financial Services Sector

With over 10,000 members, our CX Community is one of the largest and most-influential networks in North America. Over the past decade these members have connected with our satisfied partners helping leading solution providers build brand awareness, increase pipeline and grow their business.

Leading Speakers include:



BRIAN MELTER
Chief Experience Officer
LANDMARK CREDIT UNION



CINDY JEFFREY
Vice President of Customer Experience Canada,
MANULIFE



CHRIS TURCHANSKY
Chief Experience Officer
ATB

Event in Numbers

300+ 

Attendees

10+ 

Hours of Networking

10 

Exclusive Panels

100+ 

Financial Institutions

30+ 

C-Suite Speakers

Gold Sponsorship Package

Keynote Thought Leadership Speaking

- Immersive interactive 20-minute thought leadership presentation to targeted senior buyers
- Real-time interaction with audience through Q&A, live and private chat with customers
- Promote offers or downloadable thought leadership throughout event
- Upload pre-roll teaser or demo videos to build brand awareness

Branding & Visibility

- Dedicated email to attendees community promoting sponsored session
- Full PR strategy (including social media, press release and media coverage) to build brand awareness
- Amplify your content and products using hosted meetings and lounges
- Upload on-demand evergreen and product content
- Maximize brand exposure with an interactive virtual booth

Lead Generation

- Effective match-making based on Audience interest and engagement
- Network with key decision-makers via private 1:1 chats and live scheduled meetings
- Gamification strategy to promote audience engagement with Sponsors
- Generate leads during and post-event for 12 months with ongoing lead capture
- 6 Complimentary All Access Passes

Analytics & Audience Insights

- Real-time insights on content, exhibitor room and session engagement
- Analyze both high-level and detailed analytics to gain meaningful business insights
- Full post-event Audience Insight Report highlighting audience contact information and key data from polls, surveys, chats and other engagement points
- Calculate sponsorship ROI with our customized event post-mortem

Silver Sponsorship Package

Lead Generation

- Effective match-making based on Audience interest and engagement
- Network with key decision-makers via private 1:1 chats and live scheduled meetings
- Gamification strategy to promote audience engagement with Sponsors
- Generate leads during and post-event for 12 months with ongoing lead capture
- 2 Complimentary All Access Passes

Branding & Visibility

- Dedicated email to attendees community promoting sponsored session
- Full PR strategy (including social media, press release and media coverage) to build brand awareness
- Amplify your content and products using hosted meetings and lounges
- Maximize brand exposure with an interactive virtual booth

Analytics & Audience Insights

- Real-time insights on content, exhibitor room and session engagement
- Analyze both high-level and detailed analytics to gain meaningful business insights
- Full post-event Audience Insight Report highlighting audience contact information and key data from polls, surveys, chats and other engagement points
- Calculate sponsorship ROI with our customized event post-mortem

Panel/Stream Speaking or Moderator

- Engage with targeted senior buyers as a panel speaker, stream speaker or moderator
- Real-time interaction with audience through Q&A, live and private chat with customers

Objective-Driven Packages to Attain your Business Goals

	PLATINUM <i>Plenary Speakers</i>	GOLD <i>Plenary Speakers</i>	SILVER <i>Panel/ Stream Speaking</i>	BRONZE <i>Exhibitor</i>
YOUR BUSINESS OBJECTIVES	Maximum Outcome (Title Sponsor)	Thought Leadership	Thought Leadership	Branding
Speaking	✓	✓	✓	
Lead Generation	✓	✓	✓	✓
Virtual Roundtable	✓			
Branding & Social Media	✓	✓	✓	✓
Analytics & Audience Insights	✓	✓	✓	✓
Virtual Booth	✓	✓	✓	✓
Passes	4	3	2	1
PR	✓	✓	✓	



More Interactive Sponsorship Opportunities

Customize your approach and objectives. Share insights, generate leads and engage with prospects in a variety of different ways.



Birds of a Feather Interactive Session



Roundtables Discussions



Virtual Lunch and Learn



Workshops and Product Demo's



Sponsored Q&A



Icebreaker Sessions



Virtual Happy Hour

We're Driving Connections

The most prominent leaders in North America come together to share proven approaches to overcome challenges, brainstorm new solutions to their pain points and drive their business forward.





We partner with
the world's top
brands, including

250+ speakers

150+ sponsors

3000+ attendees

Partner with an Industry Leader

- Strategy Institute has been organizing events for **25+ years**
- We've been building our CX community community for **9+ years**
- Our producers research and curate **innovative** industry content
- Our **Customer Success** program ensures your success when working with us

Check Availability

Sponsorship opportunities are limited. Contact me today for a free 30-minute Lead Generation Consultation to discuss how you can generate leads and build your sales pipeline from senior CX buyers attending this event.



[@CXToronto](https://twitter.com/CXToronto)



[Customer Experience Strategies Summit](https://www.linkedin.com/company/customer-experience-strategies-summit)



www.cxfinancialservices.com

For over 25 years Strategy Institute has been a leading-edge North American content provider that delivers senior executive decision-makers with knowledge to drive performance and innovation.



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