

MOBILE FINANCIAL SERVICES

The only initiative in Canada where thought leaders from across the value-chain converge to develop strategies and openly exchange insights on current challenges and opportunities in the mobile transactions ecosystem.



- ⇒ **What roadmap do Canada's thought leaders envisage to grow transactions, customer loyalty, marketing and merchandizing via the mobile channel?**
- ⇒ **How will your Organization's mobile strategy align with the rest of the Canadian ecosystem?**
- ⇒ **How can merchants leverage the mobile channel to build on contactless, to enhance the user experience, and drive adoption in the near-term?**
- ⇒ **What near-term opportunities does the uniquely personal and increasingly intelligent nature of mobile create for Merchants, Transit, and Service Providers?**
- ⇒ **While en-route to NFC, how do Canada's leaders plan to use bridge technologies to increase consumer awareness and demand?**
- ⇒ **How will emerging applications and business models impact the value chain?**

THINKTANK LEADERS

CORE THOUGHT LEADERS



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En-Route to NFC: How can the mobile channel act as an enabler to improve customer experience at the point of transaction? How can previous experiences be leveraged to drive adoption?

The Canadian Mobile ThinkTank was formed in 2008. In Dec. 2009, leaders from across the mobile payments and banking value-chain met for the second time in an invite-only two-day roundtable. They held candid discussions on key strategic issues regarding the enablement and mass adoption of the mobile channel. NFC was introduced as a potential solution enabling several services beyond payments and banking. However, commercial availability of NFC in Canada in numbers approaching critical mass is still a while away.

The ThinkTank's thought leaders defined their focus as: "Driving an ecosystem where mobile devices act as an enabler to improve customer experience at the point of transaction, while leveraging and protecting the strengths of the Canadian market."

The objective of this year's ThinkTank is to discuss near-term solutions to drive user adoption while en-route to significant commercial seeding of NFC capable devices in Canada.

Some key questions that will be addressed are:

- ⇒ What near-term opportunities are enhanced by the mobile channel?
- ⇒ How do they impact the role of traditional value-chain players?
- ⇒ What emerging applications can leverage the unique nature of the mobile channel?

We will discuss different strategies and the impact of each on the existing value-chain dynamics, including business models and roles. We will discuss how changing dynamics will create additional revenue streams.

Like last year, we will have an open and candid roundtable; no presentations (except for keynotes) and no sales pitches!

ABOUT THE THINKTANK LEADERS

David Robinson joined Rogers in 1990 where he has held various positions in both Rogers Communications and Rogers Wireless since. In his current role of Vice President, Emerging Business, Mr. Robinson oversees the implementation of strategic, cross-company initiatives. Recent initiatives include the implementation of Rogers Portable Internet service and the related investment in pre-WiMAX technology made via the Inukshuk Partnership.

Mohammad Khan is the President & Founder of ViVOtech. Previously he held several engineering, marketing, and business development management positions during the 15 years he worked with VeriFone, where he developed payment automation systems, including the smart card and security payment products, and later helped market them in more than 96 countries. Mr. Khan was also a co-founder of the Internet Commerce Division within VeriFone and was responsible for expansion of its Internet payment systems into more than 25 countries.

Robin Dua is the President of EnStream, leading company's drive to develop transformational mobile commerce solutions. Previously Mr. Dua was the Director of Product Development for Speedpass Network. He was instrumental in making Speedpass the largest contactless payment network in the world. Prior to Speedpass, Mr. Dua was the VP of Internet Services for Primus Telecommunications and served as the Founder & CEO of GlobalServe Communications, Canada's largest independent Internet Service Provider.

David Heatherly, VP, Payment Products, Personal and Small Business at BMO Financial Group's retail banking division is responsible for developing and implementing product strategies for BMO's Credit Card and Everyday Banking businesses. Previously he held the roles of VP, BMO Term Investments; VP, Strategic Operations; Managing Director, Strategic Initiatives; and Director, Financial Strategy in the Private Client Group. Prior to joining BMO Financial Group, Mr. Heatherly held several positions at Canadian Tire Corporation.

Koichi Tagawa is the General Manager of Global Standards and Industry Relations Department at Sony. Since 2002, he has supported the standardization of NFC and FeliCa. He actively contributed to the establishment of the NFC Forum. He enthusiastically continues to contribute to the enhancement of the NFC ecosystem throughout the contactless application industry.

Ruth Thorkelson, Sr. VP of the Retail Council of Canada, leads the Council's public affairs strategy in its mission to be the Voice of Retail on Canadian retail industry issues. Previously, she provided advice and strategy on public policy development, strategic communications and public affairs to companies in the telecommunications and natural resources sectors, and non-government organizations; and served as Deputy Chief of Staff to the Prime Minister of Canada.

Richard E. Mader has over 35 years in retail information management. He formed MIC in 1999 to provide strategic consulting services to retailers and vendors. Mader's serves as the Executive Director of the National Retail Federation's (NRF) Association for Retail Technology Standards (ARTS). In the past four years Mr. Mader's has led ARTS to publish an SOA Blueprint, Could Computing whitepaper and recently, the Mobile Blueprint to guide implementation of mobile within the retail industry.

ABOUT RED MOBILE



Red Mobile Consulting delivers leading-edge strategy, planning and implementation services specializing in wireless, cloud and Web2.0 technologies across multiple sectors including healthcare, financial services, telecom, government and public safety organizations.

Dawood Khan, Partner at Red Mobile, established wireless practice for PSC in 1995, advised and educated professionals at Nortel, Motorola and other firms about the latest wireless and IT technologies and trends. In 1997 he joined Bell Labs. Over the next five years Mr. Khan was promoted to Technical Manager and subsequently Director of Sales. He has worked globally with key decision makers at SK Telecom, KTF, NTT DoCoMo, Verizon, Sprint, Telcel, as well as major Canadian operators. Currently Mr. Khan drives innovation at Red Mobile Consulting, and heads up the WiMAX Forum in Canada.

