

# iccooc

Empowering the International COO Community

## iCOOC SCHEDULE OF EVENTS 2020

- Our membership is **one degree of separation** from the key decision makers
- They are the **ambassadors of conduct** with 'COO' a trademark for ethical behaviour
- This executive community is **uniquely positioned to transform** financial services
- iCOOC's mission is to help them meet this challenge by **working better together**

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ARMSTRONG WOLFE

<b>EVENT</b> <small>All events are invitation only</small>	<b>PROTOCOL</b>	<b>NUMBERS ATTENDING</b>	<b>TOTALS</b> <small>(Oct - Dec 2020)</small>
<b>Symposium</b>	AW invites a leading professional voice/company to present their view on a specific topic aimed at supporting the COO through the pandemic.  Presentation with questions raised through the moderator via chat.	50 - 150	6
<b>Webinar</b>	Interactive presentation with a moderated, free flowing dialogue with questions and answers.  Attendee participation expected.	15 - 30	9
<b>COO / CCO Cluster Call</b>	Moderated dialogue aimed at offering the COO, CCOs, other functional leads an in-depth peer to peer exchange on specific challenges.	4 – 8	12



# GLOBAL

SERIAL	EVENT	INVITED PARTICIPANT	DATE
1	<p>COO Cluster Call</p> <p>6 – 8 Global COOs attending</p> <p>Subject: what is pressing now; agenda confirmed week before with COO input</p> <p>No invited 3rd party</p>	<p>Invitation lists will be distributed, to avoid dilution of the quality of the debate, delegation can be requested but must be commensurate in seniority to the other attendees</p> <p>Global COO</p>	<p>Every 6 weeks, date tbc</p>
2	<p>CCO Cluster Call</p> <p>Subject: what is pressing now; agenda confirmed week before with CCO input</p> <p>No invited 3rd party</p>	<p>Global CCO*</p> <p>*front office controls and conduct</p>	<p>14th October. 8th December and every 6 weeks thereafter</p>

# GLOBAL

SERIAL	EVENT	INVITED PARTICIPANT  <small>Invitation lists will be distributed, to avoid dilution of the quality of the debate, delegation can be requested but must be commensurate in seniority to the other attendees</small>	DATE
3	Global WCOOC Steering Group (Cluster Call)  No invited 3rd party	COO to appoint in-business contact and partner within HR/DnI	Quarterly
4	Global COO COVID-19 Symposium Technology and impact on the 3LOD  Invited voice: Starling Trust	COO discretion.  Interest value: global / regional: Markets COO, Control Officer, partners in compliance, operational risk, and audit.	October 9th
5	Global COO COVID-19 Symposium The role of character in leadership Invited voice: IVY Business School	COO discretion. Interest value: COO directs and HR	October 30th

# GLOBAL

SERIAL	EVENT	INVITED PARTICIPANT  Invitation lists will be distributed, to avoid dilution of the quality of the debate, delegation can be requested but must be commensurate in seniority to the other attendees	DATE
6	Global COO COVID-19 Symposium  Opportunities post BREXIT  Invited voice: panel session	COO discretion. Interest value: EMEA COO + directs as delegated	November 6th
7	Global WCOOC Leadership Symposium  Invited voice: panel session	COO discretion:  Interest value: Global COO, EMEA COOs and delegated D / MD female members of the leadership team.	October 9th
8	Global COO COVID-19 Symposium Invited voice: AFME	COO discretion. Interest value: EMEA COO + directs as delegated	November 20

# NORTH AMERICA

SERIAL	EVENT	INVITED PARTICIPANT	DATE
1	<p>COO Cluster Call</p> <p>6 – 8 Regional COOs attending</p> <p>Subject: what is pressing now; agenda confirmed week before with COO input</p> <p>No invited 3rd party</p>	<p>Regional COO</p>	<p>Every 6 weeks, date tbc</p>
2	<p>CCO Cluster Call</p> <p>Subject: what is pressing now; agenda confirmed week before with CCO input</p> <p>No invited 3rd party</p>	<p>Regional CCO*</p> <p>*front office controls and conduct</p>	<p>Every 6 weeks, date tbc</p>

# NORTH AMERICA

SERIAL	EVENT	INVITED PARTICIPANT	DATE
3	Black Heritage COO Scholarship Scheme Steering Group (Cluster Call)  No invited 3rd party	Invitation lists will be distributed, to avoid dilution of the quality of the debate, delegation can be requested but must be commensurate in seniority to the other attendees  (if participating) COO appointed delegate	Monthly to year end
4	Trade Expense COO Cluster Call Webinar  Invited voice: Cognizant	Allocated FO business lead on Trade Expense + Operations executive partner	October 15th
5	Holistic Surveillance CCO* Webinar  *chief control officer 1LoD  Invited voice: Voxsmart	Global CCO and regional CCOs	October 28th

# NORTH AMERICA

SERIAL	EVENT	INVITED PARTICIPANT	DATE
6	IBOR Transition Webinar Invited voice: Sionic	Appointed Programme Lead (with a second seat for the COO if requested)	October 29th
7	ESG Webinar Invited voice: EY	Appointed ESG lead	November 3rd
8	WCOOC Webinar 7 reasons being on a board is good for your career Invited voice: Women on Board	COO Discretion	November 12th
9	WCOOC Webinar Renewed Diversity Strategies to address representation gaps	COO discretion	November 18th

# NORTH AMERICA

SERIAL	EVENT	INVITED PARTICIPANT	DATE
10	Front office transformation Invited voice: EY	Regional CCO	November 19th
11	Voice Transcription Webinar Invited voice: Voxsmart	Global CCO and 1 x delegate	November 26th

# EUROPE

SERIAL	EVENT	INVITED PARTICIPANT  <small>Invitation lists will be distributed, to avoid dilution of the quality of the debate, delegation can be requested but must be commensurate in seniority to the other attendees</small>	DATE
1	COO Cluster Call  6 – 8 Regional COOs attending  Subject: what is pressing now; agenda confirmed week before with COO input  No invited 3rd party	Regional COO	7th October and every 6 weeks thereafter
2	CCO Cluster Call  Subject: what is pressing now; agenda confirmed week before with CCO input  No invited 3rd party	Regional CCO*  <small>*front office controls and conduct</small>	Every 6 weeks, date tbc
3	BAME COO Scholarship Scheme Steering Group (Cluster Call)  No invited 3rd party	(if participating) COO appointed delegate	Monthly to year end

# EUROPE

SERIAL	EVENT	INVITED PARTICIPANT  <small>Invitation lists will be distributed, to avoid dilution of the quality of the debate, delegation can be requested but must be commensurate in seniority to the other attendees</small>	DATE
4	Trade Expense COO Cluster Call Webinar  Invited voice: Cognizant	Allocated FO business lead on Trade Expense + Operations executive partner	October 15th
5	From Controls to Purpose Webinar Good conduct in a pandemic  Invited Voice: PwC	Global or Regional COO	November 4th
6	WCOOC Leadership Symposium The Role we can Play in Enhancing Diversity and Inclusion in the Workplace	Regional COO with 10 delegated attendees (rising stars at VP to D level)	November 5th
7	WCOOC Webinar 7 reasons being on a board is good for your career  Invited voice: Women on Board	COO Discretion	November 12th

# EUROPE

SERIAL	EVENT	INVITED PARTICIPANT	DATE
8	3LOD Organisational Design and Governance COO / CCO Cluster Call  Invited voice: Ted Macdonald	Global and/or Regional COO and Global CCO	November 10th or 17th
9	Voice Transcription Webinar  Invited voice: Voxsmart	Global CCO and 1 x delegate	November 26th

# ASIA

SERIAL	EVENT	INVITED PARTICIPANT  <small>Invitation lists will be distributed, to avoid dilution of the quality of the debate, delegation can be requested but must be commensurate in seniority to the other attendees</small>	DATE
1	COO Cluster Call  6 – 8 Regional COOs attending  Subject: what is pressing now; agenda confirmed week before with COO input  No invited 3rd party	Regional COO	Every 6 weeks thereafter
2	CCO Cluster Call  Subject: what is pressing now; agenda confirmed week before with CCO input  No invited 3rd party	Regional CCO*  <small>*front office controls and conduct</small>	Every 6 weeks
3	A lost investment? Conduct benefit analysis Webinar  No invited 3rd party	Regional COO and CCO	October 7th

# ASIA

SERIAL	EVENT	INVITED PARTICIPANT	DATE
4	WCOOC Symposium The evolving mandate of the COO Invited voice: panel session	Global or Regional COO with 15 delegated attendees (VP to MD)	October 13th
5	Defining threat management in the new world Webinar No invited 3rd party	Regional COO and CCO	November 12th

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