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Date

September 28, 2016



EXAMINING EFFECTS OF NUMERIC CUES ON CONSUMER BEHAVIOR

Daniel Bartels and Abigail Sussman
University of Chicago

Three Steps to Rapid Testing

Erik Johnson
Marketing Optimization Manager
Behavioral Insights Team

MORNINGSTAR

Overcoming Barriers to Saving

Damon Jones
University of Chicago, Harris School of Public Policy

Behavioral Insights in Practice: Lessons for the Financial Sector
September 28, 2016



Rapid-fire Testing: Getting started

Aaron Dibner-Dunlap
Program Manager | Innovations for Poverty Action

JPMorgan Insights Workshop | September 28, 2016

Behavioral Insights for Business Models

Behavioral Insights in Practice: Lessons for the Financial Sector, Wednesday, September 28th

Jonathan Zinman
Professor of Economics, Dartmouth College
Academic Lead, IPA Financial Inclusion Program

Behavioral Insights in Practice: Lessons for the Financial Sector

On September 28th, IPA's Financial Inclusion Program, together with JPMorgan Chase & Co., co-hosted a workshop on using behavioral insights in the financial sector. The event brought together top behavioral scientists from both academia and industry to present recent research on financial products and services, and how participants can integrate these lessons into their own work. The event also explored how rapid-fire testing can be used by both financial institutions and nonprofit service providers to improve the design and delivery of products and services. Speakers included experts from Dartmouth College, University of Chicago Booth School of Business, University of Chicago Harris School of Public Policy, Intuit, Morningstar, JPMorgan Chase & Co., and Innovations for Poverty Action. It was attended by about 40 participants from the private, nonprofit, and government sectors.

Sessions

Opening Remarks

Charlie Corrigan | *Vice President of Philanthropic Giving, JPMorgan Chase*

Behavioral Insights from the Academic Research

Moderator

Kyle Holloway | *Program Manager, Innovations for Poverty Action*

Panelists

Jonathon Zinman | *Professor of Economics, Dartmouth College*

Behavioral Insights for Business Models (PPT)

Daniel Bartels | *Assistant Professor of Marketing, University of Chicago (Booth)*

Examining Effects of Numeric Cues on Consumer Behavior (PPT)

Damon Jones | *Assistant Professor of Public Policy, University of Chicago (Harris)*

Overcoming Barriers to Saving (PPT)

Roundtable on Rapid-fire Testing

Moderator

Rebecca Rouse | *Director of Financial Inclusion Program, Innovations for Poverty Action*

Panelists

Nhung Ho | *Data Science Manager, Intuit*
Wasabi - A/B Testing Platform

Erik Johnson | *Marketing Optimization Manager, Morningstar (Behavioral Insights Team)*
Three Steps to Rapid Testing (PPT)

Aaron Dibner-Dunlap | *Program Manager, Innovations for Poverty Action*
Rapid-fire Testing: Getting Started (PPT)

Challenges to Implementing Innovation

Moderator

Nora Gregory | *Program Manager, Innovations for Poverty Action*

Panelists

Elana Safran | *Associate Fellow, White House Social and Behavioral Sciences Team*

Paul Woodruff | *VP of Community Development, St. Louis Community Credit Union*

Carl Morris | *Vice President of Sales, FlexWage Solutions*

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