



Fall 2022 Session Descriptions Atlanta, GA

<u>Timing</u>	<u>Breakout Session</u>	<u>Short Description</u>
Tue-AM	Working Session: Sales Activity Benchmarking	Building on our previous workshop and an emerging service provider to help define and set standards for activity benchmarking and what kinds of outputs could be delivered to participants. Will also touch on marketing metrics.
Tue & Wed	Leveraging Inclusion and Diversity <i>(Lunch Discussion Table)</i>	Consciousness of the need to be diverse is giving way to the realization that there is tremendous opportunity in adopting inclusivity on a number of dimensions is a powerful way to both solve and design solutions
Tue-AM	Developing Next-Best-Action Capabilities	In our on-going exploration of Next Best Action programs at our firms, what are the tools, technologies and business processes that are enabling improved sales and marketing outreach
Tue-AM	Marketing Segmentation and User Identification	With increasing privacy and subscription choice, it is becoming more difficult to identify and there properly segment advisors into meaningful categories for both Marketing and Distribution efforts.
Tue-PM	Working Session: Defending and promoting Tech investment	There is a growing realization that AM's are under invested in their technology platforms but continue to suffer from an inability to get Sales and Marketing initiatives funded. This is especially important in a tight fiscal cycle as now.
Tue-PM	Exploring Third Party service augmentation	A number of new offers have emerged in the past few years that are being adopted by asset managers to help fill specialty roles, knowledge gaps and meeting growing needs in both Distribution and Marketing. Who and what are they?
Tue-PM	Analytics NOT Data Management	How can analytics personnel and departments focus more of their attention on building insights and uncovering opportunities rather than data management. We continue to suffer from specialty roles and manual manipulation.
Tue-PM	Pursuing Client 360	There has been much discussion about reaching the lofty goal of having 360 degree views of advisors and teams. How close are we to attaining that and what are proven approaches that are showing traction in building client profiles?



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Wed-AM	Working Session: Next Best Action programs that work	Unlike the other session focused on the tools and technologies being used in Next Best Action programs, we want to explore and capture what some of the proven approaches and methodologies have been successful among our peers.
Wed-AM	Rebalancing Digital Marketing with Distribution	Following an extended focus on digital engagement during the pandemic, how is the balance between Marketing driven outreach and a returning traditional Distribution model now?
Wed-AM	Emerging technologies in relationship intelligence	Increasing attention is being given to better understanding all the intricate relationships that exist between individual advisors and their teams. Relationship Intelligence is an emerging practice being developed
Wed-AM	B/D Data Packs and Third Party Data Integration	Best practices for extracting value and combining with other internal and 3rd party data sets continue to be of high interest and value as new subscriptions, services and data sets are being made available to asset managers
Wed-PM	Working Session: Salesforce.com in Asset Management	A working session with SFDC representatives about specific needs, shortcomings and other requests of the SFDC ecosystem tailored specifically for the Asset Management industry. Bring your pet peeves and priority needs!
Wed-PM	CDP Programs in Asset Management (follows main session)	Building off of the AM CDP survey conducted this fall, we will share and explore what the industry's emerging approaches to achieving comprehensive CDP programs and how to distinguish from other customer-centric efforts.
Wed-PM	Non-US Data Sources	Increasingly, US and global operations are intersecting in ways that require new data sources to be used. Whether nearby in Canada and Latin America or Europe and APAC, there is growing need for these resources here in the US.
Wed-PM	Applying artificial intelligence to digital marketing use cases	A particular use case for artificial intelligence application in asset management in the digital marketing realm where algorithms can be used to help predict who, what, and how best to reach out to target audiences most effectively