

Spring 2023 Forum Scottsdale, AZ

Updated April 12, 2023

Monday, April 17

All Day: Arrivals and Check-in

Optional: Golf, Tennis, area Excursions

5:00 PM: Welcome Reception/Wine Tasting hosted by [RevenueGrid](#)

6:30 PM: Optional Dinners open to all

Tuesday, April 18

8:00 AM: Registration and Networking Hot Breakfast

9:00 AM: *Kickoff and Opening Remarks* Hazem Gamal, COO, SME Forum

9:15 AM: *How Marketing can Lead Distribution*, Bill Finnegan

10:00 AM: *Extracting Value from B/D Data Packs*, Panel Discussion with Loren Fox

10:30 AM: Breakout Sessions:

S1-Papago 1: Rightsizing your CRM Platform – What (Not!) to Include

S2-Apache 1: Building Next-Gen Segmentation Capabilities

S3-Papago 2: Achieving Data Science Enlightenment

S4-Apache 2: Third-Party, B/D and Proprietary Data Integration

12:00: Networking Sit Down Lunch with optional Partner/Topic Table discussions

1:15 PM: *Data & Analytics Portfolio Management*, Mike Lampa

2:00 PM: *Artificial Intelligence in Asset Management*, Nathan Stevenson

2:30 PM: Breakout Sessions:

S5-Papago 1: Best Practices from Sales Activity Benchmarking

S6-Apache 1: Leveraging Team and Buyer Unit Intelligence

S7-Papago 2: Using Behavior Driven Design for Requirements

S8-Apache 2: No Handoffs from Marketing, But Maybe Handovers...

4:00 PM: *Talent on the Move* a Fireside Chat with Hari Krishnaswami

4:45 PM: *Asset Management Jeopardy!* led by Dan Sondhelm and Beverly Dube

5:30 – 7:30 PM: Reception followed by Sit Down Dinner for all participants and guests

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Wednesday, April 19

7:30 AM: Registration and Networking Hot Breakfast

8:30 AM: *Evolving Product Lines Driving Operational Change, Jeff Strange*

9:30 AM: Breakout Sessions:

S9-Apache1:	Case Study: Driving Meaningful Activity Between Sales/Marketing
S10-Papago 1:	Pursuing the Growing Private Wealth Channel
S11-Apache 2:	Emerging Applications of ChatGPT and AI-driven Content
S12-Papago 2:	Opportunity Pipeline Management for Institutional Sales

11:00 AM: *Assessing Trends in Distribution, Justin Mangera*

11:45 AM: *Stop the Leakage! A Collaborative Approach, Ryan Porter*

12:30 PM: Networking Sit Down Lunch with optional Partner/Topic Table discussions

1:30 PM: Breakout Sessions:

S13-Apache 1:	Using Complex Signals for Next Best Actions
S14-Papago 1	Developing Marketing and Digital Activity Standards
S15-Apache 2:	Salesforce.com in Asset Management Working Session

3:00 PM: *New Projects Without New Funding, Ranjan Sinha*

3:30 PM: Closing Reception and Networking, Hosted by [eVestMINT Mojitos!](#)

5:00 PM: Forum Concludes and Departures

6:30 PM: Optional Dinners open to all (*meet in Lobby*)

Thursday, April 20 SME Leadership Council

8:00 AM: Leadership Council Breakfast

8:30 AM: Leadership Council Meetings

11:00 AM: Meeting Concludes and Departures