

Spring 2023 Session Descriptions, Scottsdale, AZ

<p>Building Next-Gen Segmentation Capabilities</p>	<p>While client segmentation is not a new concept at all, new sources of data, techniques and an increasingly sophisticated and complex client base requires regular updates if not an all-out reconsideration of how you segment to deliver meaningful experiences to your target audiences.</p>
<p>B/D Data Packs and Third Party Data Integration</p>	<p>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.</p>
<p>Achieving Data Science Enlightenment</p>	<p>This session will provide insight on the implementation of Data Science in distribution through a case study. We will also look for examples from the group of Data Science efforts and their outcomes At the end, we will discuss what barriers folks have faced when trying to use Data Science, and offer our thoughts on what worked for us and how to overcome barriers.</p>
<p>Rightsizing your CRM Platform</p>	<p>As Sales and Marketing needs continue to evolve and deepen, the complexities of our technical infrastructure can either drive more demand on our CRM systems or allow them to be purpose driven and not over-relied upon.</p>
<p>Pursuing Behavior Driven Solutions Design</p>	<p>Behavior driven solution development is a proven and increasingly adopted approach in the product lifecycle that takes a holistic approach to considering needs, solutions, and the varying ways in which they can be quickly deployed for high adoption rates.</p>
<p>Leveraging Team and Buyer Unit Intelligence</p>	<p>Increasing access and emphasis on teams and buyer units is driving new ways to think about how to best engage with decision makers about the products and services they consider for their Retail and Institutional clients.</p>

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<p>Growing the Sales Activity Benchmarking Consortium</p>	<p>Building on our previous workshops and current consortium results we want to focus on helping define and set standards for sales activity benchmarking and what kinds of outputs could be delivered back to both Distribution and Marketing for improved assessments of efficacy.</p>
<p>No Handoffs from Marketing, But Maybe Handovers...</p>	<p>This breakout session will be an in-depth discussion on tactics which, when implemented drive home the themes presented in the General Sessions – marketing and sales (and compliance and product) better together.</p>
<p>Case Study: Driving Meaningful Activity Between Sales & Marketing</p>	<p>By developing an analytical process that allows the sales and marketing teams to know what similar clients are buying now, much like Amazon® does with consumer products at the bottom of its web pages, we can be proactive in sales and marketing with product opportunities. The solution identifies patterns—where one product may lead to another. The sales force will have a better idea of what a client is likely to buy next. By implementing the new analytical processes you can present a wealth of client data in an easily readable format, deepen the sales force's knowledge of client needs and behaviors, provide opportunity customer lists to the marketing team with product recommendations and ultimately experience a substantial improvement in achieving sales force goals.</p>
<p>Pursuing the Growing Private Wealth Channel</p>	<p>Increasingly, asset managers are looking to better support and gain traction with a largely obscure but formidable advisor segment in Private Wealth as part of the Bank channel.</p>

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Emerging Applications of ChatGPT and AI-driven Content Development	What are some of the early proven use cases for applying artificial intelligence driven content development in the Asset Management industry and how can these emerging platforms support and improve both content development and client support.
Opportunity Pipeline Management for Institutional Sales	As opportunity management continues to evolve, a growing choice of solutions and approaches are proving to gain traction with executives (who always want to see pipeline reporting) and sales (who typically resist the transparency required from data entry).
Using Complex Signals for Next Best Actions	As Next Best Action (NBA) efforts continue to evolve and mature, a number of "signals" are emerging as strong indicators of receptiveness to engagement. Which ones are they and how can they be made available in your own platforms.
Developing Marketing and Digital Activity Standards	In addition to developing sales activity standards, SME Forum members are motivated to also set standards for marketing and digital activity and engagement benchmarks to gain a better understanding of both share and effectiveness in this growing area of importance.
Salesforce.com in Asset Management Working Session	Following our successful working session with SFDC in Atlanta, this will be both an update on progress of the priorities outlined, ongoing efforts specifically in the Asset Management space and considering what is needed next for the SFDC AM user community.

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<p>New Projects without New Funding</p>	<p>Consolidate technologies and eliminate maintenance or subscription costs by reviewing both the structure of the current project spend and areas of potential cost reduction.</p> <ul style="list-style-type: none">- Eliminating Multiple BI tools and migrating to one- Review current spend on licensing/hosting/support- Total Capx project to consolidate- Opx reduction in future years highlighted <p>Areas of potential cost to review:</p> <ol style="list-style-type: none">1. Yearly software2. Cloud and infrastructure3. Support and consulting4. Manual processing (people cost)
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