



**Global SME Forum
London, England
June 12/13, 2023**

Session Descriptions

<u>Monday Afternoon, June 12</u>	
Sales Enablement vs. Marketing Operations	Following our opening keynote presentation, this session will delve deeper into how both Sales Enablement and Marketing Operations can be a force multiplier when considering their specialties as well as their common goals and capabilities.
Marketing Leadership for Distribution Growth	With the onset of the pandemic, Marketing organizations took a lead in driving client engagement. Over the past few years, that experience has led many organizations to reconsider how Marketing can play a much larger role in helping deliver the results Sales and Distribution is tasked with.
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.
<u>Tuesday Morning , June 13</u>	
Regional Nuances Delivering Global Best Practices	Sometimes what is being done in part of the market or industry turns out to be a best practice that can be adopted across organizations. Whether it is go-to-market strategies, reporting and analytics, team structures or other aspects, there is much to be considered from local practices that can be global processes.



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<p>Use Cases for AI-Driven Content in Asset Management</p>	<p>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.</p>
<p>Getting Value out of Data Science Capabilities</p>	<p>Too many of our Data Science programs are not delivering what we hoped they would. However, through trial and error, our industry has learned how to leverage these resources in effective ways to help drive a data-first approach to Sales and Marketing.</p>
<p><u>Tuesday Afternoon , June 13</u></p>	
<p>Building Segmentation Capabilities for Marketing and Distribution</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>Leveraging Global Reporting and Analytics more Effectively</p>	<p>There continue to be opportunities to leverage existing in-house infrastructure, data, tools, subscriptions, and talent to more effectively provide the kinds of insights and intelligence that business leaders need to deliver on their objectives.</p>
<p>Emerging Data Sources and Subscriptions</p>	<p>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. This workshop will build on the already compiled catalogue of existing data providers and deepen its reach for SME Members.</p>