

## Fall 2023 Forum Short Hills, NJ Session Descriptions

<b>Tue Sessions</b>	<b>Short Description</b>
<b>Understanding Institutionalization of the Retail Market</b>	<i>Discuss how retail and institutional asset managers are realigning to address this opportunity/challenge. We are seeing a continued growth in the trend of traditionally retail models becoming increasingly institutionalized in their structure, decision making processes and needs from the Asset Management community</i>
<b>Institutionalizing your CRM Platform</b>	<i>As Institutional needs continue to evolve and deepen, the complexities of our technical infrastructure can either drive more demands on our CRM systems or allow them to be purpose driven and not over-relied upon. How are Asset Managers developing their CRM systems to support the needs of their Institutional marketing, sales, service and client needs better?</i>
<b>The ABC's of Institutional Client Onboarding</b>	<i>With a traditionally fractured approach to capturing, nurturing and closing on opportunities, more focus is being placed on aligning How Institutional teams transfer knowledge throughout the organization to create a seamless onboarding process and drive client engagement</i>
<b>Return to Mobile Platforms and Capabilities</b>	<i>With the return to more in person engagements in the sales cycle, post pandemic, sales forces have been engaged with their mobile capabilities more than ever. This includes Institutional business lines that also rely on improved access to relationship, product, mandate and competitive information while out in the field</i>
<b>Developing Institutional Segmentation</b>	<i>How are firms approaching their segmentation efforts when considering their existing and emerging Institutional clients</i>
<b>Effective Sales teams through Data-enabled Insights</b>	<i>How marketing and sales enablement teams are deriving insights from unique internal Institutional data</i>
<b>Real world AI in asset management</b>	<i>Augmented intelligence and Machine Learning are moving deeper and more prevalently into asset management operations and enablement capabilities in meaningful ways</i>

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<b>Wed Sessions</b>	<b>Short Description</b>
<b>Harvesting Sales and Marketing Activity</b>	<i>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.</i>
<b>Intersection of Institutional Sales and Retail Operations</b>	<i>Following up on the Institutional Survey update from 2021, how best to cope with the changing dynamics in the marketplace.</i>
<b>Preventing Cracks in the Pipeline process</b>	<i>How to gain adoption, implement best practices and create effective reporting of stages and business projections with a well-defined pipeline process</i>
<b>Using Next Best Action Signals Effectively</b>	<i>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.</i>
<b>Balancing Marketing KPIs and Metrics</b>	<i>Asset Managers have long struggled to provide and/or accept meaningful measures of return on effort (campaigns, advertising, outreach, client support, etc.). However, an increasingly collaborative environment between sales organizations and their marketing peers is highlighting the need to provide clearer measures of impact.</i>
<b>Financial Services Cloud Working Session</b>	<i>Following our successful working session with SFDC in Scottsdale, 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</i>
<b>Integrating Institutional 3rd Party Data</b>	<i>What vendors are providing the most useful Institutional opportunity data and how is it being incorporated into the marketing &amp; sales process</i>
<b>Best Practices with B/D, Proprietary and Advisor 3rd Data Integration</b>	<i>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</i>