THE SMEFORUM
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2024 Global Forum

Hilton Doubletree – Tower of London

Breakout Session Working Descriptions

Day/Time	Facilitators	Session Title	Working Description
Tue PM	Tony Busacca w/Maureen Byrne	Leveraging AI to Extract Value from Siloed Data	Most firms are still struggling with siloed data. How can emerging AI enabled technologies and techniques help address this issue quickly and more efficiently than traditional approaches? What early successes are we seeing that show promise.
Tue PM	Hazem Gamal	Digital Sales Rooms: Effective or Efficient?	Unlike personalized websites, Digital Sales Rooms are gaining traction in Asset Management as a supplemental sales tool and in some cases as a bonified sales channel. Explore the pros and cons along with what possibilities DSRs can bring to bear.
Tue PM	Patrick Murphy	The Case for Signal Driven Next Best Actions	Next Best Action capabilities and processes are still nascent with many firms although the technologies to enable them are developing quickly. The signal driven approach is gaining prominence and could be a viable advancement to support sales and marketing organizations alike.

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Wed AM	Hazem Gamal	Sales Enablement into Revenue Operations	While other industries have been quick to adopt a more holistic Revenue Operations strategy, it is beginning to be considered in Asset Management as a way to help better align often disparate organizations and resources.
Wed AM	Tony Busacca w/Maureen Byrne	Use Cases for AI-Enabled Content and Materials	We will have just heard about the power of content supply chains and AI could be a part of enabling that possibility with the existing technology stack at hand. How might this look as a way of accelerating the types of outcomes be demanding now.
Wed AM	Andreas Heid	Global Entity Mapping – An Emerging Approach	In the US, there is a growing consensus about orienting around selling entities. But in the non-US markets, this is a very tricky prospect. In this session we will explore a potential unifying approach that could facilitate outreach and provide a more consistent structure across markets.

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Wed PM	Hazem Gamal	Establishing Governance and Compliance for an AI World	"First Things First" and having a solid foundation to our data management requires good governance, compliance across various jurisdictions and the addition of AI only highlights these needs. What are the considerations?
Wed PM	TBD	Taking CRM to the Next Level – Innovations in Practice	With growing product lines, shifting sales and marketing channels, new data sources, and a plethora of enticing add-ons, what are some of the more accessible ways in which CRMs are being developed to meet its potential while considering the demands on it from across the firm
Wed PM	Tony Busacca w/Maureen Byrne	Using AI to Reveal Deeper Segmentation Opportunities	Another area of tremendous opportunity with AI is the discovery, maintenance and development of micro personalized segments that allow any one person or buying entity to be considered in far more ways than was ever possible before. How are firms leveraging AI to find and exploit these opportunities effectively?