

**INNOVATION AS ART:
EVOLVING TO IMPROVE**

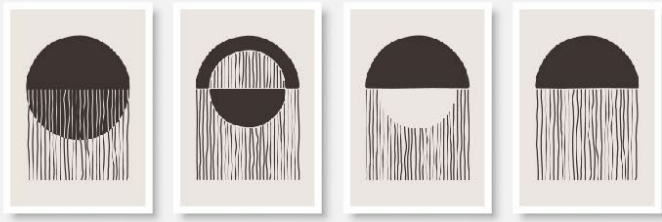
Kansas City, MO: October 21-23, 2024



Session Descriptions

Tuesday Morning Sessions

Marketing/ Sales	Demonstrating Value: Sales Enablement Teams	In these challenging economic times there are competing priorities for budget dollars (AI, Cyber, New Products), how are sales and marketing enablement teams demonstrating: their value within the organization, their ability to drive efficiencies within their processes through technology enhancements, their support to sales coaching conversations through the data and insight they deliver and their analytical prowess measuring the impact of their efforts – what types of outcomes metrics resonate with Sales, with Marketing?
Data & AI	Paths to Success: Finding AI Projects with Business Value	Discuss the ways organizations are embracing AI, building a business case and how they are using data, digital technology and AI to address their organizational challenges.
Institutional	Onboarding: Providing Differentiating Services for Retention	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. We will review how organizations are facilitating this process and discuss contrasting approaches for the different kinds of Professional Buyers with traditional Institutional processes.
Wealth	Building Capacity to Support a Distinguishing Wealth Business	As the Wealth channel turns into a bonafide business line in its own right, both Intermediary and Institutional firms are building out their product, services and distribution for this growing area of the industry. This breakout will explore how Asset Managers are orienting around the specific needs of this segment of the market.



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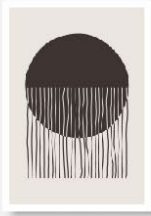
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Tuesday Afternoon Sessions

Marketing/ Sales	Navigating Emerging Strategies, Products and Platforms	With the emergence of new products such as alternative investments, we will discuss how organizations are incorporating these evolving client needs into their sales and marketing strategies and activities. We will highlight how these efforts are supported by Competitive / Market Intelligence and third party sources. And will review the impact regulations have in directing how emerging products CAN BE marketed.
Data & AI	Driving Adoption: Use Cases for Emerging AI Solutions	Discuss how firms are developing their AI strategy where they combine digital capabilities, robust AI adoption and leverage well defined data leading to a proactive strategy that drives performance.
Institutional	Improving the Buying Experience: Enabling the Sellers	How can the Institutional sales team deliver an excellent experience to their clients/prospects? We will discuss use cases of activities, sales enablement tool solutions and data advancements leveraged to drive a better sales experience.
Vendor Solution	Hike2	A data and AI Governance Framework to Consider. This interactive breakout will explore and highlight ways in which asset managers can extend their data governance to coordinate and include the unique elements of AI technology implementation. Based on successful client work, Hike2 will also share what other asset managers are learning and applying in successful ways.



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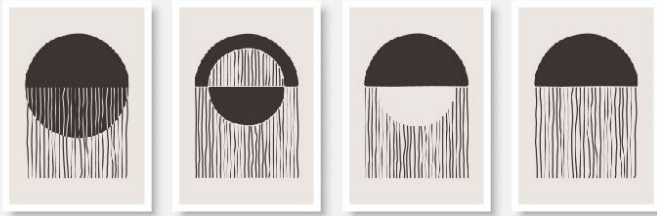
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Marketing/ Sales	Customer 360 from your CRM Platform	In this session we will discuss where firms are in their development process to achieve a full client journey within their CRM and ensuring the organization has the necessary tools to provide the best support at every stage. Also, how does data and analytics play a role in the lifecycle and where are firms in their data journey? Additionally, we will review how firms map their sales strategy and sales processes to the client journey to highlight moments of maximum impact and to enable data and analytics from these interactions to continually improve client experiences.
Data & AI	Data Before AI: Getting your Data Ready	Firms need to focus on AI use cases that add the most value and ensure that they have the data and digital capabilities to meet the need. In this session we will discuss examples of use cases at various firms and discuss the barriers and successes of each.
Institutional	Achieving Client Driven Experiences Efficiently	How are Institutional organizations incorporating the voice of the client into their servicing model, product development and ultimately the sales cycle?
Innovation	Innovating with AI: Are you doing it Right?	It is hard enough applying standard AI capabilities into existing business processes, let alone trying to innovate using AI as a lever. This session will explore ways in which to think about AI as a multiplier solution. Instead of looking for something completely new to pursue, what are the low hanging fruit that can benefit from marginal innovations using AI that could deliver outsized results.



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Marketing/ Sales	Evolving Structure and Organizations to Meet a Changing Industry	We will discuss how sales/marketing organizations are optimizing their structure, discussing reporting lines, centralization/de-centralized of roles and what roles are tied to what functions or products. Where does technology plug in, and what challenges/benefits does the structure create? When asked to do more with less, where do people focus, and what activities/functions get deferred?
Data & AI	Emerging Skills, Experiences and Roles Required in an AI World	We will discuss how firms are reskilling their organizations in the age of AI and what are some of the challenges they have faced in helping their team members and the approaches they have taken to improve their skills.
Institutional	Leveraging Data Sources to Improve the Growing Wealth Mandate	During this discussion we will investigate the advancements firms are making with data integration into the Institutional client lifecycle. What data is vital, where are firms shifting their data focus, how does it impact the CRM and what analytics are being developed for the organization. How has consolidation in the Competitive / Market Intelligence space impacted these data strategies?
Vendor Solution	Nasdaq/eVestment	Approaches and use cases in Off-Platform data management. This discussion will include specific examples from current users of the insights and signals managers are leveraging to identify opportunities and boost engagement with allocators. We will also explore the different mediums managers are using to ingest the data, i.e. via NDL, Snowflake, ML4SF and where the data is going i.e. to SF, Tableau/PowerBI, Seismic, etc so that there is broad inclusion of the various ways firms operate.