THE SME FORUM

Learn. Connect. Grow. Solve.

2024 Asset Management Roundtable
November 21, 2024
Hosted at T.Rowe Price, London

1:00 – 1:30pm Arrivals and Welcome in London

1:30pm GMT/ 8:30am ET: Start Meeting In Person and Online for all Participants

1:40-2:15pm

Leveraging CRM platforms

- What are others doing to understand how useable and relevant their CRM platforms are?
- How do we measure ourselves vs our competitors, considering usability and efficiency?
- How do you get your wholesalers to input great notes? Anyone using activity/meeting summary capture tools (could be AI, could not) to do so?
- Specifically, when wholesalers are on-the-road – what's the best way to enable great activity and note capture?
- Does your sales team use the sales funnel in their CRM? If so, how did you drive adoption of that? How does leadership leverage/optimize the sales funnel insights?
- For my peers - What's next in your CRM maturity roadmap? What value are you trying to drive?
- Related to AI – what's the future of the CRM in an AI-dominated world? Does it just structure data? Is the sales team directly interacting with the CRM anymore?
- How have you approached change management with Wholesalers? Best practices? Frameworks?
- Non-data-driven wholesalers - It's a persona I've encountered. How do you reach out to this wholesaler? How do you get them to entertain new ways of doing business?

2:15 – 3:00pm

Adopting AI capabilities

- Leveraging third party versus home-grown AI solutions
- Salesforce and Microsoft promise to solve for all AI use cases, but when is a boutique provider more appropriate?
- How are you comparing vendors and thinking about integration?
- Where do you focus internal analytics efforts versus leveraging an AI vendor?
- How do you evaluate an AI vendor?

Break 3:00 – 3:15 pm

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3:15 – 4:00pm

Driving reporting and analytics (Joined by Darren Plimmer of Alphix)

- Having a product that would marry external industry data with internal data to create actionable intelligence would be very helpful for sales people. For example, something that would blend our CRM system with With Intelligence, MandateWire to flag new searches that fit our mandate.
- How do customers feel about recorded conversations? Common sense is they don't like it, but will this change with the rise of AI? I expect more and more financial advisors are using AI note taking with their own customers
- Other than activity and meeting summarization, what else does the org get out of it – anyone have experience getting coaching insights from meeting recordings and transcriptions?

4:00 – 4:20pm

- **Integrating 3rd party services and subscriptions**
  - What are some reliable data source outside major markets like US, North America… difficult to screen investors in Southern EU or Middle East for example – is someone working on this?
  - Tools to pre-screen opportunities to get a faster read in the industry

4:20 – 4:50pm

Enabling marketing and communications

- Tactics to attract clients – how to come up with relevant content for investors while minimising internal resources
- How do you get agreement on what a good lead is
- How do you get commitment that Sales will follow up on a Marketing-led lead
- Any frameworks for coordinating Head office versus Wholesaler-led marketing?

4:50 -5:00pm Wrap up and next steps

5:00pm All are welcome to hosted reception by the SME Forum and Fundamental Media/Alphix downstairs at Happenstance

7:00pm Dinner

Note NEW address as of Nov 2024:
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