



**EVOLUTION IN A REVOLUTION:  
HOW WE ADAPT AND ADOPT**  
New Brunswick, NJ: April 21 - 23, 2025

**SME  
THE FORUM**

## Session Facilitators

New Brunswick, April 22/23, 2025			SME Forum Facilitators and Co-Moderators								
Time	Track	Session Title	Hazem	Mario	Bill H	Tony	Rajan	Lyndsay	Inder	Leah	Bill S
Tue AM	Sales & Distribution	<i>Emerging Tools &amp; Technologies Enabling Distribution</i>		P	S						
Tue AM	Marketing	<i>Reconsidering Client Journeys by Persona</i>				P					S
Tue AM	Channel Evolution	<i>Organizing for Diversifying Sales and Product Channels</i>					P			S	
Tue AM	Solutions Workshop	<i>Free the Data: Bridging Business and Compliance for AI Success</i>	P					S	S		
Tue PM	Sales & Distribution	<i>Overcoming Challenges of Supporting Intermediary Sales</i>				S				P	
Tue PM	Marketing	<i>Delivering ROI from Institutional Marketing Efforts</i>		P							S
Tue PM	Data, Tech & AI	<i>Best Practices in Capturing Value from Unstructured Data</i>			S		P				
Tue PM	Solutions Workshop	<i>How to Develop and Choose Build vs. Buy Options</i>	P					S			
Wed AM	Sales & Distribution	<i>Strengths of CRMA, Tableau, and Power BI for Sales Enablement</i>				P					S
Wed AM	Marketing	<i>Keys to Successful Partnerships between Marketing &amp; Distribution</i>	S						P		
Wed AM	Channel Evolution	<i>Aligning Capabilities for Evolving Channels</i>		S						P	
Wed AM	Data, Tech & AI	<i>Navigating the values of CDPs, Data Lakes and MDMs</i>			S		P				
Wed PM	Sales & Distribution	<i>Emerging Success Cases in Trigger-based Sales Campaigns</i>							P		S
Wed PM	Marketing	<i>When to use Marketing vs Sales-driven Leads</i>				S	P				
Wed PM	Data, Tech & AI	<i>Extracting Value from Data Packs and 3rd Party Sources</i>		P						S	
Wed PM	Solutions Workshop	<i>Compliant Content at the Speed of AI</i>	P					S			