



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

SME
THE FORUM

Session Descriptions (as of April 3)

Tue AM	Sales & Distribution	Emerging Tools & Technologies Enabling Distribution	<i>The session "Emerging Tools & Technologies Enabling Distribution" explores how innovative digital platforms, data analytics, and AI are transforming distribution strategies in asset management. It highlights how firms are leveraging these technologies to better understand client needs, personalize engagement, and optimize sales efforts. Attendees will gain insights into practical applications and future trends shaping distribution in a rapidly evolving landscape</i>
Tue AM	Marketing	Reconsidering Client Journeys by Persona	<i>Understanding your audience is #1 key to crafting targeted, effective marketing strategies. This breakout session, will demonstrate how creating detailed ROLES based buyer personas can significantly enhance asset management marketing efforts. By identifying the specific needs, pain points, and behaviors of the decision makers, you can develop personalized messaging that resonates and drives their engagement. We'll discuss how buyer personas help optimize your content and campaigns, and build stronger, more trusting relationships with your clients while boosting your marketing ROI.</i>
Tue AM	Channel Evolution	Organizing for Diversifying Sales and Product Channels	<i>As distribution models evolve, product teams play a critical role in driving growth through new and diversified channels. This session will explore how product organizations can adapt to support multi-channel sales strategies—from aligning offerings with digital and direct-to-client platforms to collaborate more closely with marketing, sales, and data teams. Learn how leading firms are restructuring product functions, leveraging data for channel-specific insights, and accelerating time-to-market for tailored solutions. Join us for a practical discussion on how product teams can lead innovation and enable success across a broader distribution landscape</i>
Tue AM	Data, Tech & AI	Free the Data: Bridging Business and Compliance for AI Success	<p><i>In this session co-hosted with our vendor partner HSO, we will lead a working session on ways to enroll Compliance, Info Security, Legal and other areas of the business that might be reluctant to allow broader use of aggregated client, proprietary and other data to help surface insights and intelligence that can help propel the business.</i></p> <p><i>In this interactive session we will discuss: How firms are using AI in sales & marketing What governance actually looks like</i></p>



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			<p>Quick demos + live polling A roadmap to get your data AI-ready</p> <p><i>It's practical. And it might just save you months of trial and error.</i></p>
Tue PM	Sales & Distribution	Overcoming Challenges of Supporting Intermediary Sales	<p><i>Supporting intermediary sales is more complex than ever, with increasing demands around data, reporting, compliance, and coordination across teams. This session is designed specifically for sales operations professionals navigating these challenges. Join your peers for a focused discussion on streamlining internal workflows, improving CRM and data alignment, enabling field sales teams, and scaling support without sacrificing quality. Walk away with practical strategies to enhance efficiency, reduce friction, and better position your firm to drive growth through intermediary channels.</i></p>
Tue PM	Marketing	Delivering ROI from Institutional Marketing Efforts	<p><i>Institutional marketing teams are under pressure to prove the value of their strategies. This session explores how asset managers are aligning marketing efforts with business objectives to drive measurable results. Industry leaders will discuss data-driven campaign strategies, the integration of sales and marketing, and best practices for demonstrating ROI to stakeholders. Attendees will gain practical insights into optimizing resources, leveraging analytics, and building marketing programs that deliver real business impact.</i></p>
Tue PM	Data, Tech & AI	Best Practices in Capturing Value from Unstructured Data	<p><i>Unstructured data in CRMs, emails, notes, and other internal systems often holds untapped insights critical to asset management. This session explores how leading firms are leveraging AI, natural language processing, and data integration tools to unlock actionable intelligence from unstructured sources. Participants will share practical strategies, technology considerations, and real-world examples of how unstructured data can enhance client engagement, support investment decisions, and drive operational efficiency.</i></p>
Tue PM	Solutions Workshop	How to Develop and Choose Build vs. Buy Options	<p><i>For some firms each data source presents its own Build vs Buy decision, while others are all-in on Build. Co-hosted by our vendor partner(ship!) between Kyloe and Broadridge, this session will explore the common considerations for Build vs Buy and how asset managers are addressing some of the historical challenges of the Buy decision through the use case of their new Salesforce integration.</i></p>



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Wed AM	Sales & Distribution	Strengths of CRMA, Tableau, and Power BI for Sales Enablement	<i>This interactive session will explore how leading analytics platforms—CRM Analytics (CRMA), Tableau, and Power BI—can be leveraged to empower our sales teams. Participants will dive into each tool's unique capabilities, strengths, and integration opportunities, with a focus on driving data-informed decision-making, enhancing client engagement, and streamlining sales workflows. Real-world use cases, success stories, and best practices will provide attendees with actionable insights on selecting and optimizing the right solution for their sales enablement strategy.</i>
Wed AM	Marketing	Keys to Successful Partnerships between Marketing & Distribution	<i>The buzz around artificial intelligence (AI) often leads us to believe that technology can replace human collaboration and creativity. However, the truth is that while AI can enhance efficiency and streamline processes, there is no AI in team. Successful teams thrive on human connection, creativity, empathy, and communication and shared visions—qualities that no algorithm can replicate. This breakout session will explore how to integrate AI as a tool to support your team, not replace it, and how human ingenuity remains the core driver of success. We'll delve into examples, offer actionable insights, and challenge the perception that AI can function as a stand-alone solution.</i>
Wed AM	Channel Evolution	Aligning Capabilities for Evolving Channels	<i>In today's rapidly evolving financial landscape, asset managers must rethink traditional distribution strategies to stay competitive. This session explores how firms can effectively organize teams, processes, and technology to diversify sales and product channels. Industry leaders will share insights on restructuring for omni-channel engagement, integrating digital tools, aligning product development with emerging client needs, and fostering cross-functional collaboration. Attendees will gain practical frameworks and real-world examples to help their organizations adapt and thrive in a more complex distribution environment.</i>
Wed AM	Data, Tech & AI	Navigating the values of CDPs, Data Lakes and MDMs	<i>It's tough navigating the complex landscape of enterprise data infrastructure! In this session we'll unpack the roles of Customer Data Platforms (CDPs), Data Lakes, and Master Data Management (MDM) systems within asset management firms, focusing on integration patterns, data governance, lineage, and scalability. Through participant implementation insights, we will explore how to consider interoperable systems that support advanced analytics, regulatory reporting, and personalization at scale — while avoiding common data silos and redundancies.</i>



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Wed PM	Sales & Distribution	Emerging Success Cases in Trigger-based Sales Campaigns	<i>Firms are leveraging trigger-based, next best action (NBA) sales strategies to drive client engagement and increase conversion. Through real-world success stories, participants will share how data signals, automation, and predictive analytics are used to identify the right moment, message, and channel for outreach. Insights into building agile sales campaigns, integrating NBA into existing CRM systems, and measuring impact. Join us to learn what's working, what's next, and how to accelerate your own NBA journey.</i>
Wed PM	Marketing	When to use Marketing vs Sales-driven Leads	<i>In the evolving landscape of asset management, aligning marketing and sales strategies continues to be crucial for driving growth. We will explore when to prioritize marketing-generated leads versus sales-driven outreach, how to identify which approach fits your target audience, and how to build a collaborative lead generation framework. Join us to share real-world examples, performance metrics, and best practices for creating a seamless pipeline from interest to investment.</i>
Wed PM	Data, Tech & AI	Extracting Value from Data Packs and 3rd Party Sources	<i>In this session we will dive into the frameworks and methodologies asset managers are using to operationalize broker/dealer data packs and third-party datasets. Topics will include data normalization, entity resolution, integration into CRM and BI platforms, and the application of advanced analytics and machine learning to identify sales opportunities and measure distribution effectiveness. We will explore common data quality challenges, API-based ingestion, and governance models required to manage complex data pipelines. Attendees will walk away with a deeper understanding of how to architect scalable data solutions that drive strategic value across distribution, marketing, and product functions.</i>
Wed PM	Solutions Workshop	Compliant Content at the Speed of AI	<i>Discover how AI can transform content creation while streamlining compliance in asset management marketing. This session co-hosted by our vendor partners at BlueprintX will explore practical use cases, tools, and strategies that enable marketing teams to produce high-impact, personalized content at scale—while staying aligned with evolving regulatory requirements. Learn from the practitioners and your peers as we share insights on leveraging AI to boost efficiency, reduce risk, and drive better engagement across channels – compliantly!</i>