

Agenda: 2017 International CRM Forum
Monday 05th June & Tuesday 06th June
Hosted by Legg Mason – London, England UK

Monday, 05th June

Andaz London – A Hyatt Hotel
40 Liverpool Street
London EC2M 7QN

5:00 – 7:00 Member & Partner Networking Reception

Masonic Temple Room - Grade I listed masonic temple / Opulent room of marble, mahogany and gilt built in 1912 / City's only original Freemasons meeting lodge.

7:00 – 9:00 Member & Partner Networking Dinner

Fenchurch – Unique private dining space

Located in the heart of vibrant East London, Andaz London Liverpool Street opened as the Great Eastern Hotel in 1884 and one of London's original railway hotels.

Tuesday, 06th June
The 2017 International CRM Forum
Marriott London County Hall
Westminster Bridge Road
London SE1 7PB

Perched along the banks of the River Thames, just moments away from Westminster Abbey, the Marriott London County Hall provides incredible views of the London Eye and Big Ben.

***All CRM Forum meeting sessions and overnight accommodations will be at The Marriott London County Hall.**



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Tuesday 6th June

8:00 – 9:00 Member & Partner Networking Breakfast
Queen Mary Room

9:00 - 10:00 Member & Partner Industry Discussion
King George V Room

Regulatory challenges & solutions:

a. Brexit b. Mifid II c. Singapore MAS

EU GDPR regulation and how the firms are getting ready for this change and the impact on their processes and information stored in the CRM.

How they deal with data privacy regulations in a world where sharing information, global coverage models and global support models rule the day.

10:00 – 10:30 Member & Partner Networking
Morning Coffee Break
Queen Mary Room

10:30 - 12:30 Member Only Roundtable Exchange
King George V Room

Integration of Third Party Data Sources: Such as Financial Clarity (UK)

Analytics and Data: The relationship between the CRM system/data and other data sources?

CRM Contact Strategy: What specifically is tracked
What is used to house / manage the information – just the CRM or do other tools come into play?

Contact Management in Terms of Ownership: i.e. How do people use their CRM to allocate their clients to different sales teams where one Organisation/Account can have multiple contacts who may be covered by different business areas.

Mobile CRM: How are the sales teams using?
How does the functionality differ: Mobile vs. Desktop versions?



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12:30 - 13:30 Member & Partner Luncheon
County Hall Library

13:30 - 14:30 Member & Partner Roundtable Exchange
King George V Room

CRM User Adoption Abroad Workshop

User Adoption abroad:

a. Power users b. Training materials c. Language barriers d. Analytics

What has been implemented at SSGA
The challenges faced. The successes.

Questions for each group:

- What innovation would you use?
- What partnership would you leverage (internally/externally)?
- Can you articulate your goals for CRM Engagement?
- How does your organization approach sales enablement?
- Do they consider CRM an integral part of sales enablement?

Presented By:

Sharon Claffey Kaliouby
Nicholas Jubb

14:30 – 15:00 Member Partner Networking
Afternoon Coffee Break
Queen Mary Room

15:00 – 16:00
Member & Partner Networking and Business Card Exchange
The Noes Lobby Bar

