Fall 2013 CRM Forum
Monday September 16th & Tuesday September 17th 2013
BlackRock / Hyatt at the Bellevue, Philadelphia PA

AGENDA: Topics for Discussion

MONDAY, September 16th

2:00 – 4:00 Member Only Roundtable Exchange
Conference Rooms 1 & 2

5:00 – 6:30 Member & Partner Networking Reception

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

TUESDAY, September 17th

7:00 - 8:00 Member & Partner Networking Breakfast

8:00 - 8:30 Opening Remarks and Introductions

8:30 - 10:00 Presentation by Industry Expert

10:00 - 12:00 Member Only Roundtable Exchange
Conference Rooms 1 & 2

12:00 - 1:00 Member & Partner Luncheon

1:00 - 3:00 Member & Partner Roundtable Exchange

3:00 - 4:00 Member & Partner Networking and Business Card Exchange

4:00 Scheduled Departures from hotel to Philadelphia airport

All sessions will be held at the Hyatt - Bellevue unless noted as such.

MONDAY, September 16th

2:00 – 4:00 Member Only Roundtable Exchange

Conference Room #1
Marketing / Client Experience

Use of Social Media: is it relevant.
Has anyone figured out how to “Crack the code”.
What business value has come from using Chatter today? If not is it being planned for future?
Social Media that is integrated with CRM - Inside or Adjacent to CRM System

How do we rationalize E-mail Marketing – Sales Force / Exact Target and Oracle / Eloque

Campaign Sales Profiles: how are they being shared with distribution?

For campaign, list management, and leads how are member firms managing the record ownership / sharing of contacts/firms/etc.

How do you measure the success of events and campaigns. What analytics are used?

What are the members thoughts on the lead/campaign management mergers and acquisitions that have taken place (ExactTarget by Salesforce; Eloqua by Oracle) – any change in those product’s services or vision? Would you still move to Eloqua or Exact Target after knowing this change occurred?

What level of management reporting is integrated into their CRM.

Is anyone using dropbox or other solutions to provide collateral to CRM users (including via mobile devices)

Is anyone using Jigsaw?

How has retirement data integrations with Brightscope been going?

We are interested in discussing CRM integration with Marketing Automation Systems- and any case studies that can be shared.

How do we communicate: To our clients / Sales Management / User Community
How often: - Should we track and measure for New Business / Best Client

Conference Room #2
Metrics / Analytics

Data Quality!! This is what we do.
How can we do it better.
What is the level of resources dedicated to : Analytics / Business Intelligence / Data Cleansing.

Sales Reporting : Inside or Outside of CRM
Sales Leadership Updates vs Queries: How are they utilizing the output.

The ongoing Omnibus issue and if anyone sees any positive Movement (perhaps related to Omniserv)

A few of us have had side discussions about predictive analytics recently. What vendors are used? Is it done internally? What specific goals do you have in your analytics program? Do you have the right/accurate data to make it effective? Is it working?

Market Metrics / Reports - Training: How to keep motivation in sales goals data?
How many CRM Forum Members subscribe to Market Metrics, and I believe nearly everyone's contract comes up Spring 2014. It might be the right time and forum to bring up market metrics' future and questions/concerns that we might be able to address together.

What are the pros / cons of the Access Data or SalesConnect integrations for trade and rep data?

DCIO – Collection of Data

Data Quality Scorecards

How do firms measure data quality? What are some specific metrics they use to measure the quality of their data, (ie, not just whether the field is populated).

Specifically, what is the steady state number of 'new advisors' they use? How do they measure it? How do they know they've de-duped records to their fullest?

There's been a lot of talk about how different firms work at cleaning up data, de-duping data, etc. I'd like to know how do they measure it so that they know: How big a problem they have? How their efforts are make progress? How will they know they've reached the max return on their efforts (ie, are either 'done' or, have reached steady state)?

Do you have Reports/Dashboards within CRM embedded from your BI-Data Warehouse? If yes, how do you decide which ones are in CRM and which ones are in BI-Data warehouse? What BI tool you preferred for integrating with your CRM?

5:00 – 6:30 Member & Partner Networking Reception

The Conservatory at the Hyatt

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

TBD

TUESDAY, September 17th

7:00 - 8:00 Member & Partner Networking Breakfast

8:00 - 8:30 Opening Remarks and Introductions

8:30 - 10:00 Presentation by Industry Expert

The Future of Social Media in the Asset Management Industry

Jesse Mark - Head of research and analysis for Ignites Distribution Research
A division of Money Media Financial Times Company.

Jesse will share research and insights around the use of social media in the asset management and insurance industries. Topics of discussion include financial advisors usage of social platforms, developing a social media strategy, best practices in social media from inside and outside the industry, and measuring ROI efforts of social initiatives.

10:00 - 12:00 Member Only Roundtable Exchange

Conference Room #1
CRM Engagement Strategies

How do sales receive their information from Management?
What tools are utilized to deliver that information? IE: Mobile Devices.
Has management implemented any "Rules of Engagement" with and between sales persons?

What are the challenges of leveraging best practices developed in US across globe.
Utilizing consistent practices and processes within different cultures and infrastructure.
How is compliance handled with various country view restrictions for CRM

We would like to discuss the pros and cons of Salesforce.com. We are getting pressured to migrate from Oracle to Salesforce and we are not convinced that Salesforce is any better.
What led you to selecting Salesforce?
What challenges have you had to overcome?
Did they deliver on your requirements?
How much customization did you do to the application?

What is a good or bad CRM Installation? Should you stay with existing system or move.
Where did we go wrong:
Business requirements – Solution Provider Mislead - Inadequate Due Diligence?
When you made the switch "Changed CRM Providers" … What would you do differently.
How do you repair from a bad Implementation?

In switching CRM Systems how do you handle training?

How are firms handling their mobile CRM Integration?
Mobile: What new feature are you thinking of rolling out to the mobile application to your sales?
Are you planning on taking advantage of features like Camera, GPS, etc. in your application?

How are you handling Ipad integration with CRM Systems
Ipad vs Window Tablet? Are we seeing a move away from Ipad yet?

Conference Room #2
CRM Business Processes

How is technology improving your CRM.

What are the challenges of comingling CRM with 3^{rd} party data?

Are there advantages to utilizing business partners in a global environment?
Ex: Civicom to assist with data entry globally.

How do you deal with compliance: Event in Asia / Data capture in Philippines?

Is the Cloud the right operating model?

Sales Process for Intermediaries: Lifecycle of a lead. How is it maintained?

How is the Sales Process reflected in the CRM?

Should Power Users have the ability to set configurations?
What controls or processes are in place to manage this?

CRM integration to Outlook – will Salesforce or anyone every really do this well?

Integration of Sales Back Office and Middle Office

An area of internal discussion lately was CRM/phone system integration. We would be interested in hear what others have done and/or plan to do on this topic.

How to make CRM Relevant to the entire origination?

In Multi Tiered CRM Systems:
Retail – Institutional – Retirement
How are staffing resources allocated to support CRM.

Best practices for training: Self Paced Competition / One on One

Institutional Space – Sales Practices: What do they need for support?

Fall 2013 CRM Forum
TUESDAY, September 17th

1pm – 3pm Member & Partner Roundtable Exchange

Institutional Consulting Roundtable Exchange

Discussion between Institutional Representatives from within the Asset Management and Consulting Industry

Some topics they will cover are: "How do you"?

Plan your client account coverage.

Choose the distribution relationships to focus the sales teams on.

Decide what message to deliver or what product to represent to the client.

Record your interaction to share the information with your sales team and provide yourself with notes for managing future conversations.

Management of Channel Data - DCIO / Retirement / Institutional Direct

Institutional Space – Sales Practices: What do they need for support?

In Multi Tiered CRM Systems: Retail – Institutional – Retirement
How are staffing resources allocated to support CRM.

What is utilized to provide sales reporting to measure data in system for sales optimization and make information relevant to sales

Identify New Opportunities to the pipeline and determine how much is or should be a percentage of yearly goals

During this segment we will be hearing from several representatives of Institutional & Consultant Account Management (Individuals whom oversee the relationships with the institutional firms and consultants) with member firms that will walk us through a typical day with a focus to define the obstacles and identify solutions to effectively interact with their clients and sales support & management.

This is being designed to be a very robust and interactive discussion which will allow institutional account management, members and partners an opportunity to converse and exchange ideas.

<u>3:00 - 4:00 Member & Partner Networking and Business Card Exchange</u>

<u>Grand Ballroom Atrium at The Hyatt</u>

<u>4:00 - 4:30 Scheduled Departures from Hyatt Hotel to Philadelphia Airport</u>