Spring 2012 CRM Forum
Monday April 16th & Tuesday April 17th 2012
JP Morgan 1111 Polaris Parkway, Columbus Ohio 43240

AGENDA: Topics for Discussion

MONDAY, April 16th

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

5:00 – 7:00 Member & Partner Networking Reception
Hilton Hotel 8700 Lyra Drive | Columbus, OH 43240

7:00 – 9:00 Member & Partner Networking Dinner
Cantina Laredo 8791 Lyra Drive | Columbus, OH 43240

TUESDAY, April 17th

7:30 - 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
Sales Management Panel Discussion.
What is the Future of CRM?

3:00 - 4:00 Member & Partner Networking and Business Card Exchange
Hilton Hotel 8700 Lyra Drive | Columbus, OH 43240

4:00 Scheduled Departures from Hilton Hotel to Airport

<u>All sessions will be held at JP Morgan unless otherwise noted.</u>

MONDAY, April 16th

2:00 – 4:00 Member Only Roundtable Exchange

Conference Room #1
Marketing / Client Experience

What are firms doing to manage the ever-growing number of channels, tactics, and technologies that now enable businesses to engage with customers?

How do multiple channels affect CRM, Marketing campaigns and segmentation?

iPad: Are people allowing wholesalers to email documents within their CRM app (i.e. literature or a presentation)? Send a link instead of a PDF? If so how?

How do firms deals with validating advisor e-mail lists and is there a source that provides accurate verification?

Marketing Database (in-house or outsourced) - information on where others are with this, if outsources why, inputs on outsourced vendors, etc.

Marketing/ Campaign - What are the tools used and how is the data analyzed.

Are any firms applying Customer Intimacy as a discipline?

Do you have client contact standards and what measures are they against?

MONDAY, April 16th

2:00 – 4:00   Member Only Roundtable Exchange

Conference Room #2
Metrics / Analytics

What are your favorite Metrics?

Which Dashboards or Reports provide the best view?

How are firms allocating business from call center sales teams (ex: ML Edge)

Web Analytics / Leads / Integration with CRM

How to handle the rep's data that are part of a team?
If the team spans different branches does it cause a redesign of the Firm, Branch, Rep structure?

Are teams primarily in the same Branch?

Team Card Relationships: How are firms associating multiple records that contain the same individual(s)

What are the different strategies/technologies of representing data across different systems and CRMs been used, so that the users have a overall layout of the data

TUESDAY, April 17th

7:30 – 8:00 Member & Partner Networking Breakfast

8:00 – 8:30 Member & Partner Introductions

8:30 - 10:00 Presentation by Industry Expert

David Blum CIO
The Ohio State University Fisher College of Business.

In David's role as the CIO for the business school he spear-headed an effort to consolidate multiple CRM platforms into a single college-wide platform and will provide insights into the experience in doing so.

TUESDAY, April 17th

10:00 - 12:00 Member Only Roundtable Exchange

Conference Room #1
Cloud Computing / Mobile

How are you using the cloud?

What does CRM Day 5 look like?

User experiences with the tools they are using (specially around PYXIS and salesforce)

- Anyone using cloud file sharing tools such as Dropbox, Box.net, etc.?
- How is security handled?
- Are the data bases centrally maintained and monitored?

Who has deployed iPhones to their sales associates and how are they making the device as secure as a Blackberry? How are they capturing SMS?

What information are other companies providing to their mobile applications? Are there separate applications for Sales people, separate application for what Marketing wants to provide and separate for everyday tools?

TUESDAY, April 17th

10:00 - 12:00 Member Only Roundtable Exchange

Conference Room #2
Business Processes/ CRM Engagement Strategies

Is anyone using Agile methodology?
If so: Pros and Cons

How best to engage global clients and manage relationships.

Customer Data Management: What is the frequency of purging and archiving data? What parameters are used to identify records to purge? How frequently are records purged?

How are firms achieving adoption of use? Which types of profile attributes are most often adopted?

What information are sales users looking for on a one-pager about their FAs and branches? Do they share these with the FA or Branch Manager?

How do others (companies) manage reporting where their CRM supports multiple channels and sales managers manage sales folks from multiple channels? Is it strictly channel based or manager based.

What are the Strategies used for measuring and understanding % of flows that are directly attributable to wholesaling or marketing activity.

Which Strategies are best utilized to define "best customers" via data analytics?

How can we effectively utilize CRM to reduce redemptions?

How are firms preparing for the new fiduciary standard of care and how are they planning on leveraging their CRM systems / data to facilitate the new standard?

Is your firm investing in CRM technology and if so in what capacity?

TUESDAY, April 17th (continued)

12:00 – 1:00 Member & Partner Luncheon

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

A day in the life of Sales Management:

Panelists:

Phil Anglim JP Morgan / Joe DeVico BlackRock
Brian Pieloch Merrill Lynch / Marty Griffin Pioneer

During this segment we will be hearing from several representatives of Sales Management (Individuals whom oversee wholesalers) 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 CRM Systems.

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

Plan your territory coverage.

Choose the advisors to focus the sales teams on.

Decide what message to deliver or what it is your wholesalers will speak to the advisor about.

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

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

TUESDAY, April 17th (continued)

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

What is the Future of CRM?

Highlight trends that are reshaping the marketplace!

CRM in the past was mass contact and generic content.

The Internet created a self serve, we search environment.

Today we manage our own consumption of data and information.

Personalization is anticipated. Delivery based on past behavior.

Social CRM provides an avenue to listen to the client.

Advances in Technology allows for virtually unlimited access…

3:00 - 4:00 Member & Partner Networking and Business Card Exchange
Hilton Hotel 8700 Lyra Drive | Columbus, OH 43240

4:00 Scheduled Departures from Hilton Hotel to Airport