Fall 2012 CRM Forum
Monday September 10th & Tuesday September 11th 2012
Natixis @ Marriott 777 Memorial Drive, Cambridge Mass 02139

AGENDA: Topics for Discussion

MONDAY, September 10th

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

5:00 – 7:00 Member & Partner Networking Reception
Marriott 777 Memorial Drive Cambridge, Ma. 02139

7:00 – 9:00 Member & Partner Networking Dinner
Asgard Irish Pub 350 Massachusetts Ave. Cambridge, Ma. 02139

TUESDAY, September 11th

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

8:00 - 8:30 Opening Remarks and Introductions

8:30 - 10:00 Presentation by Industry Expert
Build your brand: Essential strategies for uncovering your true value

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
A day in the life of Key Account Management.

3:00 - 4:00 Member & Partner Networking and Business Card Exchange
Marriott 777 Memorial Drive Cambridge, Ma. 02139

4:00 Scheduled Departures from Marriott Hotel to Airport

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

<u>MONDAY, September 10th</u>

<u>2:00 – 4:00 Member Only Roundtable Exchange</u>

<u>Conference Room #1</u>
<u>Marketing / Client Experience</u>

Best practice on Firm Hierarchy and locking down ability to create records from users Personal email addresses and how you steward emails

Reporting, large trades in CRM or using other methods?

Page design/simplification & Training and support model (IT and BI)

Acquiring lists from firms and comparing to what we have in the CRM.

Any simple process to confirm correct records, update current ones, add reps, and review reps not on the list. We have developed a process but many parts are manual.

Does anyone have a source for email addresses? Is there a good one out there.?

MONDAY, September 10th

2:00 – 4:00 Member Only Roundtable Exchange

Conference Room #2
Metrics / Analytics

How do financial services firms make CRM more of an output tool (providing information that is sales relevant) versus a input / data gathering tool.

What are the most common metrics/ Rep profile data, firms have on their dashboard (for sales people and management)

Is anyone is using a cloud based sales reporting / Analytics tool integrated with CRM. In lieu of a traditional software package (eg, Cognos)

Discuss Effective ways of integrating internal and external sales data (i.e. market metrics) into CRM

How do firms best manage and ensure data integrity? Keeping data clean?

Discussion on the user interface of Team/Partnership of Reps in CRM

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Ted LeClair
Senior Vice President, Client Solutions Group
Director, Natixis Advisor Academy

Build your brand: Essential strategies for uncovering your true value

Help you reach your full potential by building a strong brand.

Ted will share his insight and show you how to:

- recognize key elements of a strong personal brand
- discover the truth about what makes your brand unique
- implement best practices for building your brand

TUESDAY, September 11th

10:00 - 12:00 Member Only Roundtable Exchange

Conference Room #1
CRM Engagement Strategies

Do you leverage outside (employee) relationships for leads, across channels? Do you leverage social networking? If so what and how?

How are CRMs being integrated onto iPads?
Discuss the technology, challenges and lesson learned?

How do you maintain client privacy (and individual sales person interest) yet encourages collaboration?

Territory alignment / realignment.
How do firms tackle this, what data is used, what tools are used.

Who has deployed the Market Metrics Mobile / iPad App.
If so: how are they using the data, pros and cons.

TUESDAY, September 11th

10:00 - 12:00 Member Only Roundtable Exchange

Conference Room #2
CRM Business Processes

Who is driving force behind CRM design (management, sales teams or support teams)?

What is the biggest value add within your CRM design

CRM Assessment - Firms who recently has evaluated their CRM against the other market offerings. Discussion on following topics

- Discuss briefly the overall process of assessment
- Highlight the main comparison metrics
- If already converted the CRM, based on assessment discoveries, discuss the new CRM and its alignment with assessment findings

CRM users who are not wholesalers. As an example - key account managers...they may have contacts that they do not want to be exposed to all users, but also may want to be able to view FAs that other users see. How do firms deal with this?

TUESDAY, September 11th

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

Key Account Management Recap:

A day in the life of Key Account Management:

Panelists:
Rachel Jacobs – Delaware Investments
Jerry Murphy – John Hancock
Jennifer Wightman – Fidelity Investments
Martin Griffin Pioneer Investments

During this segment we will be hearing from several representatives of Key Account Management (Individuals whom oversee the relationships with the distribution and institutional firms) 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 client account coverage.

Choose the distribution relationships to focus the sales teams on.

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

Record your 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 key account 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?

Customer Relationship Management (CRM) is a widely implemented model for managing a company's interactions with customers, clients, and sales prospects. It involves using technology to organize, automate, and synchronize business processes—principally sales activities, but also those for marketing, customer service, and technical support. The overall goals are to find, attract, and win new clients, nurture and retain those the company already has, entice former clients to return, and reduce the costs of marketing and client service. Customer relationship management describes a company-wide business strategy including customer-interface departments as well as other departments. *Wikipedia

Measuring and valuing customer relationships is critical to implementation.

What happens after the 360 Degree View

- **Identify demographics through Social IDs**
- **Capture customer conversations**
- **Customer Influence Index**
- **Gather online feedback**
- **Monitoring customer needs**
- **Fostering customer relationships**
- **Utilize alternate channels of communication**

TUESDAY, September 11th

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…

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