



Inaugural CRM Forum Virtual Global Meeting

London/NYC/Kansas City/Denver
CoHosted by American Century and JanusHenderson
Tuesday, November 20, 2018

Arrivals and Networking	All participants can arrive up to 30 minutes in advance at their respective host locations. See separate email with specifics for your location.
Opening and Welcome	<ul style="list-style-type: none"> ✓ Welcome to all and meeting logistics ✓ Quick introductions from each location
Discussion Agenda	<p>Operations</p> <ul style="list-style-type: none"> - How are teams being staffed and organized to meet growing demands - What strategies are being pursued to consolidate systems, or not - With Brexit still looming, how are firms responding to UK exit from EU <p>Institutional vs Retail</p> <ul style="list-style-type: none"> - How are growing US/Global Institutional teams organizing differently - Where are you seeing the most emphasis on supporting your Institutional teams - What third party services and other resources are being considered to support Institutional efforts <p>Sales and Marketing</p> <ul style="list-style-type: none"> - How are Sales and Marketing teams working together outside of the US and with the US - As these two organizations increasingly overlap, how are you supporting their technology needs - There are a growing number of third party providers specializing in the non-US market, which are you considering <p>Data Management</p> <ul style="list-style-type: none"> - How are you handling differences between US and Non-US entities - With often differing infrastructures, how are you meeting needs for reporting consolidation - What data governance practices are we putting in place to meet biz/reg demands - Following up on GDPR Compliance implementation, what has the fallout been
Closing Remarks	<ul style="list-style-type: none"> ✓ Wrap of meeting and Follow-up steps from discussion ✓ Planning for June 2019 Annual Global Forum in London, England ✓ Next US Forum is in NYC area on Monday and Tuesday April 29/30
Networking and departures	All locations have space reserved for 30 minutes past end of meeting. Feel free to continue the conversation and exchange contacts