

CRM Forum
November 16th, 2010
Agenda

Tuesday November 16th, 2010
BNY Mellon

- 8:30 - 9:00 Check-In / Networking Breakfast
- 9:00 - 9:30 Welcome - Tony Busacca
Introductions: Members/ New Members / New
Participants
- 9:30 - 11:30 Roundtable Discussion
See attached topics
- 10:15 - 10:30 Break
- 11:30 - 1:00 Working Lunch
Industry View: Bob Herrmann
President Discovery Data
- 1:00 - 3:30 Roundtable Discussion
See attached topics
- 2:15 - 2:30 Break
- 3:30 - 4:00 Closing Remarks - Tony Busacca
Networking



CRM Forum November 16th, 2010 Roundtable Discussion Topics

Client Experience:

- Discuss the on-boarding experience for new clients.
- Does it differ for existing clients who enroll in additional accounts?
- How do you document user experience?
- What metrics are used to measure user experience?
- How do you collect ideas for improvements?
- Do results impact planning & development?
- What key metrics do you put on your dashboard?
- How do you prototype enhancements and get the users to actively participate?

Marketing:

- Where have lead distribution & product prospect lists been utilized?
- How are leads qualified: campaigns / web usage / pages visited
- Where have firms found success in assessing market share data that has been positively adopted by their distribution teams?
- How has web channel targeted messaging been implemented?
- Social CRM - what is your strategy?



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Business Intelligence:

- What has been successful business intelligence solutions adopted by sales organizations - specifically by field teams?
- Who are key sources for industry institutional data (e.g. pension, private wealth, endowments, etc.) and where have firms had success in integrating within distribution?
- How has Data Enrichment been utilized - D&B? Reuters? Insideview?

Sales Support:

- Relative to CRM tools and processes, how do product specialists/internal sales support work with advisors and relationship managers?
- What has your CRM done to enhance salesforce ability to be successful?
- Sales Metrics - what does your company use for metrics?
- What are the key metrics that you put on your Sales dashboard?



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Technology Enhancements:

- Are firms evaluating their CRM solutions and what are the pro's/con's of using a hosted solution?
- How does one strike a balance between a lean & lightweight CRM system that is simple and intuitive to use, vs. a robust portal that gives you access to all account detail?
- What does the future of CRM look like in terms of technology?

