

**CRM Forum
March 16th, 2011
Agenda**

Wednesday March 16th, 2011
Bernstein Wealth Management

- 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 Networking Lunch
Industry View with Matt Whitten
@ Infinata a Financial Times Company
Sales Intelligence &
Building an Advisors Book of Business
- 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
March 16th, 2011
Roundtable Discussion Topics

How is client campaign management and marketing activity defined?

What are touch points for delivery?

1. On Line
2. Telephone
3. In Person

What are the approaches to customer segmentation?

1. Do they have a clearly defined strategy and implementation plan?
2. What's the support model? How do they train and support users?
3. Are analytics captured and if so to what extent are they utilized?
4. How is client segmentation aligned to sales efforts?

What are firms doing to understand:

1. Party to party relationships, householding, requirements for handling multiple party groups for different purpose.
2. IE: servicing, fee management, etc.

Firms that have transferred / migrated from one CRM platform to another:

1. Did that effect adoption?
2. What was the cost? Was it worth it?
3. How long did it take?
4. How did they evaluate cost benefit analysis?



CRM Forum
March 16th, 2011
Roundtable Discussion Topics

Is your CRM Strategy – “Formal or Informal”:

1. How do organizations define CRM?
2. What governance structures exist around the CRM strategy?
3. What is the scope of CRM activities?
4. What channels does it cover, currently and aspirationally?
5. How do organizations reconcile a centrally managed CRM strategy with the relationship oriented nature of the FA/client relationship?

Which CRM are Firms are using: Especially interested in Salesforce or Microsoft CRM.

1. What has their experience been?
2. How committed are they to it...is it an enterprise focus or line of business/area focused?
3. Is CRM aligned to the business strategy?
4. Have they defined their roadmap for going forward?

Is there an APP for that.....

IPad's / Notebooks / Smart Phones

Are Advisors interested in obtaining?

Is Management considering acquiring?

What is the status of web based Advisor / Client Communications?



Industry View with Matt Whitten @ Infinata a Financial Times Co. Sales Intelligence & Building an Advisors Book of Business:

Business building tips for advisors that are looking to grow their book of business efficiently and effectively.

“In 2003, an industry study found that 60 percent of sales organizations had ramp-up times of less than six months. Today, that number has dropped to under 40 percent. This year's study data showed companies that give new reps access to sales intelligence (SI) systems have significantly shorter ramp-up than those that do not.”

Identify Daily Rollover Opportunities by Tracking Executive New Job Appointments

Find executives who have taken new jobs in your area. Call them to congratulate them on their new position. Then the door is open to discuss moving their 401(k) from their old company.

Target Executives as They Become Liquid

Target officers of public companies when they sell stock. Monitoring liquidity events and other wealth creating events helps you to know when an executive is coming into a significant amount of cash. This information can help you to target executives and uncover referral opportunities.

Identify Millionaires Next Door

Search for retirement plans with a small number of employees but large assets. These are businesses that are closely held where the owner or president controls a large portion of the total plan or profit sharing assets.

Resourced properly Advisors not only know whom to call, but also what to discuss in order to land that first appointment. As a result, they get more opportunities. In addition, gaining access to knowledge throughout the sales and prospecting cycle should mean getting to close more and grow their book of business faster.



**CRM Forum
October 5th, 2011
Agenda**

Wednesday October 5th, 2011
Credit Suisse 11 Madison Ave NY NY

- 8:30 - 9:00 Check-In / Networking Breakfast
- 9:00 - 9:15 Welcome - Tony Busacca
Introductions: Members/ New Members / New
Participants
- 9:15 - 11:45 Roundtable Discussion
See attached draft topics
- 10:15 - 10:30 Break
- 11:45 - 1:15 Networking Lunch
Industry View
- 1:15 - 3:45 Roundtable Discussion
See attached draft topics
- 2:15 - 2:30 Break
- 3:45 - 4:30 Closing Remarks - Tony Busacca
Networking



CRM Forum
October 5th, 2011
Roundtable Discussion Topics

Does your firm place an emphasis on the systematic analysis and use of customer information as a platform for marketing and management?

How does your firm gather customer knowledge?
Do you utilize that data to improve marketing efficiency?

How is activity tracking and service level reporting handled?

What data is collected for front office activities, including sales, service and support? Is the information intended to be used both in call/contact centers and by the sales staff in their customer contacts?

Which of the following have opened up new possibilities for communicating with customers? (Such as: Personal contact, telephone, mail, web sites, e-mail, and self-service telephone.)

What are the current trends in the advice-led selling of wealth management products?

Who are utilizing performance metrics such as reporting on number of opportunities, percentage of leads converting to opportunities?



**CRM Forum
October 5th, 2011
Networking Lunch**

Industry View

Sphere of Influence

Navin Sharma

*Director, Global Product Strategy for Enterprise Data Quality, Pitney Bowes
Business Insight*

How looking beyond existing customers and examining their networks can help uncover hidden patterns and trends in your industry and business. Understanding who customers are interacting with and influencing can help your organization be dynamic in an ever changing landscape.



CRM Forum
October 5th, 2011
Roundtable Discussion Topics

Who is mapping back metrics to business processes?

Are Customer interaction strategies driven by Customer Loyalty measurements?

How are Customer Service standards devised?

What is your Web-Based Marketing Strategy?
Does it include Lead Generation?

Who has established a Customer Data Mart which will be utilized for Data Mining & Data Warehousing?

Will social CRM processes be aligned with traditional CRM procedures?

