

Fall 2018 CRM Forum  
Monday October 1<sup>st</sup> and Tuesday October 2<sup>nd</sup>, 2018  
Hilton St. Petersburg Bayfront – St. Petersburg, FL  
Host: Franklin Templeton

## **FINAL AGENDA**

### **MONDAY, October 1<sup>st</sup>**

**11:00 am – 12:30 pm**

#### **Welcome Member & Partner Forum Discussion**

Hilton St. Petersburg Bayfront (Grand Bay Ballroom)

**Tony Busacca - On Course Advisors**

**Hazem Gamal - On Course Advisors**

**Michael Mendelowitz – Franklin Templeton**

**Jeff Mehi - PIMCO**

**Loren Fox - Ignites Research**

#### **CRM Forum – Fall 2018 - Benchmark Survey – “Sources & Uses of Data Packs”**

**CRM Forum** is collaborating with **Ignites Research** (the research arm of the *Ignites* news service) on a survey seeking to examine "data packs" that asset managers acquire from distributors (such as Morgan Stanley, LPL, etc.). We define "**data packs**" as those packages of data that can be associated with specific leads, whether individual advisors or branch offices; trend data does not count. The aim of this survey is to better understand the extent to which CRM Forum members use these data packs, how they decide to acquire data packs, and how useful they find these data packs. This survey's results will serve as the basis for the discussion.

**12:30 pm – 1:30 pm**

#### **Member & Partner Luncheon**

Hilton St. Petersburg Bayfront



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**2:00 pm – 4:00 pm**

**Member Only Roundtable Exchange**

Hilton St. Petersburg Bayfront –  
Room 1 (St. Petersburg Ballroom I); Room 2 (St. Petersburg Ballroom II); Room 3 (St. Petersburg Ballroom III)

Consistent member-selected topics across all Roundtables. Random assignment of Members in each Roundtable. This roundtable session is designed to dive deeper on this morning's findings from the Data Pack survey and panel discussion.

Questions each group can work from to open and seed the discussion:

**Data Packs**

- Based on the survey findings how do you now assess *your* organization's use of data packs
- What did you learn from the survey that was new and unknown to you beforehand
- In what ways do you think the data packs can be/are used to support:
  - o Marketing segmentation and messaging
  - o Sales teams better target their next best call or visit
  - o Sales and Marketing management develop mid to long term strategies
- What are some improvements that could be made to the data packs for easier use?

**Data Operationalization**

- In what ways have you seen effective operationalization of data for
  - o Client, team or firm profiles
  - o Analytics and visualization tools
  - o Next best action lists, prescriptive leads.
  - o Integration into CRM or other direct consumption platforms
- What other third-party data sources are you also using or contemplating
- How are you handling the governance of data across your organization? De/Centralized?
- How are you tracking and assigning trades to the appropriate channels of complex B/Ds
- How are you able to stitch together disparate data sources into a cohesive data source?
- How are the foreign based data providers differing from what we are finding here in the US?

**ROI and Measures**

- Are there any ROI calculations or assessments you can make about the value of the data?
- What methods of evaluating the efforts and return on the data are you using?



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**5:00 pm – 7:00 pm**  
**Member & Partner Networking Reception**  
Hilton St. Petersburg Bayfront

**7:00 pm – 9:00 pm**  
**Member & Partner Networking Dinner**  
**The Post Card Inn**

Bring your flipflops! We will be dining beneath the Tiki Pavilion overlooking the ocean with direct access to the beach. After dinner we will have an open pit fire under the stars. And because it is turtle season, we may get to see some hatchlings run the gauntlet to the ocean.

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## **TUESDAY, October 2<sup>nd</sup>**

**7:00 am – 8:00 am**  
**Member & Partner Networking Breakfast**  
Hilton St Petersburg Bayfront

**8:00 am - 9:30 am**  
**Member & Partner Discussion by Industry Expert**  
Hilton St Petersburg Bayfront (Grand Bay Ballroom)

**Tony Busacca – On Course Advisors**  
**Michael Mendelowitz - Franklin Templeton**

### **How the Rapidly Changing Dynamics for Advisors is Driving Fintech**

Our guest speaker Bill Hartz is founder/dean of the Institute for Innovation Development, a financial services business innovation platform and network. He will share his own experiences and the results of his Institute's research and discovery on how Asset Managers can better leverage technology to assist their Advisor clients.



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**10:00 am - 12:00 pm**

**Member Only Roundtable Exchanges**

Hilton St. Petersburg Bayfront –  
Room 1 (St. Petersburg Ballroom I); Room 2 (St. Petersburg Ballroom II); Room 3 (St. Petersburg Ballroom III)

Consistent member-selected topics across all Roundtables. Submitted topics below are to seed discussion. Aligned Members in each Roundtable. (Based on self-selection of function during CRM Forum Registration process).

These exchanges will be oriented towards sharing best practices, experiences, and future considerations.

**Member Only Exchange - Room 1 (St. Petersburg Ballroom I)**

**TEAMS AND ORGANIZATION**

- How are your teams currently organized and structured?
- What changes to your teams are you considering?
- As teams complete programs and project, how are you transitioning them to BAU/support.

**TECH RELATED**

- Based on the visions that have been laid out for by the business, what new investments in technologies are you making?
- When considering technical projects around data and analysis, how is any ROI being calculated?
- When you are considering the tools and solutions that you are working with, how are you considering both Marketing and Sales needs?
- How are natural language processing, machine learning and augmented intelligence showing up in your solutions?

**OTHER**

- Are you working on any integration of Social Media capabilities into your infrastructure?
- What efforts are being put towards the growing ETF and SMA business?
- How are you handling multiple CRM instances and/or consideration of collapsing to one/fewer?
- For shops with SFDC, how are you transitioning from Classic to Lightning?

**Member Only Exchange - Room 2 (St. Petersburg Ballroom II)**

**TEAMS AND ORGANIZATION**

- How are your teams currently organized and structured?
- What changes to your teams are you considering.
- As teams complete programs and projects, how are you transitioning them to BAU/support.



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**END USER ENGAGEMENT**

- What technologies are you using to help improve user adoption?
- From an end user engagement perspective, how would you express ROI on the data and analytics efforts that are being pursued.
- Are you experiencing an increase in end-user driven research and analysis vs. having home office directives?
- Where are you having the most success with engaging your end-users to learn new processes, technologies, etc.

**MARKETING AND OTHER**

- To what degree are you finding that marketing efforts need to be included in your user engagement support and training.
- To the degree that you have a Social Media strategy for your sales personnel, how are you engaging them to leverage it.
- Are you finding that there is increasing attention and focus on SMA and ETF business?
- How are you employing Social Media (LI, FB, Tw) in your sales and marketing efforts?
- From a mobile sales enablement perspective what are the arguments/experience for/against build vs. buy.

**Member Only Exchange - Room 3 (St. Petersburg Ballroom III)**

**TEAMS AND ORGANIZATION**

- How are your teams currently organized and structured?
- What changes to your teams are you considering
- How are Sales and Marketing working together to support sales personnel and marketing efforts.

**SALES AND MARKETING**

- Because of the underlying similarities in the data and target audiences, how are both Sales and Marketing needs being addressed.
- How is Social Media showing up at your organization for Sales and Marketing purposes.
- What marketing automation are you working with and considering supporting.

**CRM AND TECH**

- Has anyone been successful at implementing an “all in the CRM” approach.
- As cloud-based solutions continue to proliferate are you making the move as well or staying on-premise.
- How are natural language processing, machine learning and augmented intelligence showing up in your solutions
- How are the SMA and ETF businesses developing at your organizations and driving effort in your areas



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**12:00 pm - 1:00 pm**  
**Member & Partner Luncheon**

Hilton St Petersburg Bayfront

**1:00 pm – 2:00 pm – Member & Partner Roundtable Workshop**  
**2:00 pm – 3:00 pm – Member & Partner Roundtable Presentations**

Hilton St. Petersburg Bayfront –

Room 1 (St. Petersburg Ballroom I); Room 2 (St. Petersburg Ballroom II); Room 3 (St. Petersburg Ballroom III)

This Member Partner Roundtable Exchange will take on similar structure of Roundtable Rooms for Members + Partners. Each RT will have a singular topic aligned with functional responsibilities. Participants in each RT will be segmented by self-selected function. Format will be 45 minutes of discussion in each individual RT followed immediately by regrouping into the main room and each RT will report back (10 - 15 minutes) on findings from each individual RT.

This interactive workshop style session will be oriented around each of the three primary functional responsibilities. There will be multiple groups for each functional area to capture learnings and then share with the entire room all together. You will need to select a scribe and a presenter once your group is together in your breakout. You need to be back in the main room ready to present by 2:00 pm.

**Member & Partner Roundtable Workshop – Room 1 (Partners)**

As partners with broad experiences across the industry, what are five key things that sales and marketing operations need to be thinking about in 2019.

**Member & Partner Roundtable Workshop – Room 2 (Members)**

Based on what has been shared at the Forum, what are some key practices or approaches you will be considering when you get back to your shop.

**Member & Partner Roundtable Workshop – Room 3 (Members)**

As you think about what you have been able to accomplish this year, what important initiatives will you be advocating.

**3:00 pm – 4:00 pm**

**Member & Partner Networking and Business Card Exchange**

Hilton St Petersburg Bayfront



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**CRM Forum Strategy Group**

Hilton St. Petersburg Bayfront

**Tuesday, October 2<sup>nd</sup>**

**6:00 pm – 9:00 pm**

**Networking & Dinner**

Off Property – TBD

**Wednesday, October 3<sup>rd</sup>**

**8:00 am – 12:00 pm**

**Meeting**

Hilton St. Petersburg Bayfront – Bayboro Room

**12:00 pm**

**Departures**

Hilton St. Petersburg Bayfront

