



## MONDAY, NOVEMBER 13, 2017

7:30 am – 9:00 am

**Registration and Breakfast**

9:00 am – 9:15 am

**Welcome by Conference Co-chairs & Introductions from Sponsors/Exhibitors**

*Conference Co-chairs:*

*Deborah Well, Director of E-Business at Harbor Capital Advisors*

*Daniella Boni, Marketing Director at Callan Capital*

9:15 am – 10:15 am

**General Session**

### ***Capitalizing on Disruption: Transforming Your Distribution Organization for 2020***

Industry consolidation, new competitive and disruptive entrants, technology adaptation, regulatory pressure, and changing advisor business models are some of the catalysts of change reshaping the competitive landscape for asset managers.

For asset management organizations, dramatic changes will be needed to meet these challenges. In this presentation, Lee Kowarski, VP with DST Systems, will address:

- The impact of industry consolidation
- The future of asset management distribution and marketing
- Finding the right balance in a changing landscape

*Speaker:*

*Lee Kowarski, Vice President, DST Systems*

10:15 am – 11:00 am

**Networking Break & Visit with Exhibitors**



11:00 am - 12:00 pm

### Concurrent Breakout Sessions

#### ***Disruption ... Millennials' Style***

Love 'em or hate 'em, millennials are disrupting the financial services industry in several significant ways. Learn how and why they are changing the world as we know it and what firms can do to attract and retain millennials as clients and employees.

*Speaker:*

*Libby J. Dubick, Founder, Dubick & Associates*

#### ***PAICR Platinum Sponsor Session***

##### ***Using Cloud Videography for Institutional Asset Marketing***

By radically simplifying and reducing the cost of video production, cloud videography has introduced a new level of flexibility in using video to capture a firm's product and process stories, making it now practical to customize videos for specific clients and RFPs.

In this session you will learn: what the ideal video length for audience retention is; why scripting is a bad idea; the simple magic of adding green-screen; how to get better buy-in from subject matter experts; and how to measure the effectiveness of your video assets.

*Speaker:*

*Jonathan Bentley, Founder and President, Wealth Advisor Video*

##### ***The RFP Process: Best Practices for Working with Stakeholders Across the Firm, From Sales to Compliance (Roundtable)***

This session will give insight into the inner workings of completing a successful RFP. This open discussion will include best practices for accessing the talents and information of other internal departments, as well as tips for communicating with and building relationships with professionals across your firm.

*Moderator:*

*Beth Sherring, Institutional Messaging, Brown Advisory*



***Is it Time for Scrum to Scram? Alternative Agile Methodologies for Financial Services Marketing***

Scrum Master, Product Owner, Velocity, Burndown Chart — the agile methodology known as Scrum comes with a lot of baggage, and for many marketers, the complexity of Scrum just doesn't work. Fortunately, there are other agile processes that deliver the same results without dramatic role changes or steep learning curves. This session will explore two of them, Kanban and Scrumban, so your team can pick the right approach the first time.

*Speaker:*

*Andrea Fryrear, Chief Content Officer, Fox Content Ltd.*

**12:00 pm – 1:15 pm**

**Lunch & Visit with Exhibitors**

**1:15 pm – 2:15 pm**

**General Session**

***What If You Killed Marketing?***

Most financial companies today are using a 60-year-old model to promote their offerings. They create, run and iterate short-term campaigns across expensive channels to get their products and services in front of rented audiences. But what if you killed marketing as it's practiced today? Firms like Red Bull, Lego and Kraft now look at marketing as a business model, rather than as a functional cost center. They've eliminated the department that simply describes the value of their products and services, and have instead transformed some part of their marketing into an actual revenue center. They've re-invented their marketing as the function that invests in building audiences. This approach allows companies to monetize audiences and change the behavior of consumers in their favor, positioning them to stay a (big) step ahead of the competition. Robert Rose and Steven Shapiro will talk about how you could be marketing at a profit.

*Speakers:*

*Robert Rose, Chief Strategy Officer, Content Marketing Institute*

*Steven Shapiro, Founder and President, Communications Strategy Group*



2:15 pm – 3:15 pm

## Concurrent Breakout Sessions

### ***The Future of Online Advertising for Financial Services***

From browsers declaring war on Flash animation to Google's move to kill pop-up ads, and with targeting – and re-targeting – getting more sophisticated and granular, the state of online advertising is in a state of change. Listen to experts talk about the currently evolving landscape and where they predict things are headed – and where you need to be to be effectively spending your advertising dollars.

*Moderator:*

*Deborah Well, Director of E-Business at Harbor Capital Advisors*

*Panelists:*

*Graham Thomas, Consultant, Investing Channel and RIABiz*

*Adam Dunn, Senior Director, Finance Division Sales, ALM*

### ***Sustainable Investing: A Slow-Burning Disruptor Ready to Ignite?***

Socially responsible investing, sustainable investing, impact investing - it goes by many names - is not a new concept. Its origins go back decades, but it's been relatively slow to catch fire in the U.S. However, change seems to be afoot. Investor and advisor interest in the area has never been higher, with a range of factors helping to fan the flame.

Our workshop speakers - specialists in product marketing and management, with both retail and institutional experience - hail from two leading asset management organizations with long-established roots in this investment field. Their goal is to help you wrap your head around the WHAT, WHY and HOW of this still-evolving investment philosophy.

*Speakers:*

*Christina Schmieder, Head of Retail Product Marketing, Nuveen*

*Anthony Eames, Director of Responsible Investment Strategy,*

*Calvert Research & Management, Eaton Vance Distributors Inc.*



### ***Tailoring Your Brand's Voice in a Disrupted Marketing Landscape***

Suit and Tie, Casual Friday, jeans, email, emoji, bitmoji. How we communicate our brand's voice to our clients is changing at an increased velocity. While asset managers have historically been conservative and traditional in their branding, there is a trend of some firms shifting to a much more informal approach. With this shift - along with a seismic shift in reading habits towards short form content - how does a brand keep up with the times and stay relevant? Listen to our panel discuss their ideas to make sure that your firm makes the right choices in expressing your brand so that you don't get left behind

#### ***Speakers:***

*Tucker Slosburg, President, Lyceus Group*

*Scott Wentworth, Founder and Head Financial Writer, Wentworth Financial Communications*

### ***How Do You Measure Marketing Success? (Roundtable)***

To be a successful marketer, you need to prove ROI on marketing programs. With all the tools and analytics available to marketers, how do you cut through the clutter and select the most appropriate metrics? In this interactive discussion, learn best practices and tips from peers on marketing measurement in a disruptive marketing environment.

#### ***Moderator:***

*Steven Shapiro, Founder and President, Communications Strategy Group*

### ***PAICR Platinum Sponsor Session***

Qvidian is the leader in enterprise-class cloud-based RFP and proposal automation and expert advisory services. Over 1,000 companies worldwide and 200,000 users win more business with better processes, improved productivity and more effective sales documents.

#### ***Speaker:***

*Qvidian Corporation*





3:15 pm – 4:00 pm

**Networking Break & Visit with Exhibitors**

4:00 pm – 5:00 pm

**Concurrent Breakout Sessions**

***Case Study: Building an Honest, Effective Voice with a Strong Social Content Strategy***

Asset managers have rightfully ramped up their investment and focus in social media strategies, however, many digital content teams still struggle to define their voice. How much and what kind of content should they produce, and on which channels should they distribute it? This session explores how one company works to deliver a relevant and effective social media experience to their audience, and the journey the firm took – and is still taking – to constantly optimize it.

*Speaker:*

*Michael Corasaniti, Digital Marketer, Legg Mason*

***Trends and Best Practices in SEO***

SEO (Search Engine Optimization) is the art and science of knowing how to win favor with Google and the other major search engines. SEO builds brand awareness, generates leads and truly touches all areas of digital marketing from paid to earned to owned media. But search engines algorithms are complex and the search landscape is increasingly competitive. So join us for a straightforward discussion about exactly how search engines work, how they're evolving and what you can do to stay one step ahead of the competition.

*Speakers:*

*Stephanie Dressler, Senior Vice President, Dukas Linden PR*

*John Bertino, CEO, The Agency Guy*

***What Do Employees Really Want? (Roundtable)***

How often do you come home shouting, "I love my job!"? What would it take? Benefits, work-life balance, culture, fair treatment, an open career path? In this roundtable, we'll discuss what it takes for them employees be fulfilled in their roles.

*Diane Hallett*

*RFP Manager, Eaton Vance Management*



### ***Disruptive Forces: Data, Robos and Technology***

The panelists will talk about the disruptive forces within the realm of technology and data impacting how we engage clients, along with trends in these key areas impacting marketing and our industry.

#### *Moderator:*

*Lauren Smith, Head of Channel & Product Marketing, Invesco*

#### *Panelists:*

*Donie Lochan, CTO, Invesco*

*Mike Bieselin, Head of Insights & Analytics, Invesco*

*Bryan Perryman, Jemstep COO and Head of Digital Strategy, Invesco*

### ***PAICR Platinum Sponsor Session***

Seismic celebrates ideas and innovation. From the technology they create, to the company that they keep. They're changing the way our world works – and it starts with you.

#### *Speaker:*

*Seismic*

**5:00 pm – 7:00 pm**

**Cocktail Reception**

**TUESDAY, NOVEMBER 14, 2017**

**7:30 am – 9:00 am**

**Registration and Breakfast**

**9:00 am – 9:15 am**

**Welcome by Conference Co-chairs**

**9:15 am – 10:15 am**

**General Session**

### ***The Agile Marketing (R)Evolution: How to Harness the Power of Change***

Find the right audience. Communicate with them honestly. Deliver amazing value. The foundation of truly great marketing hasn't shifted much in the last two hundred years. But while the "what" of marketing remains constant, the "how" is evolving at a breakneck pace.



Now, for this sector more than almost any other, agile marketing offers a way to turn disruption from a constant annoyance to a competitive advantage. Using stories from our marketing forbears, and a few recent cautionary tales, Andrea Fryrear, one of the world's most sought-after agile marketing experts, will show you exactly how to embrace the agile mindset and transform your team.

*Speaker:*

*Andrea Fryrear, Chief Content Officer, Fox Content Ltd.*

**10:15 am – 11:00 am**

**Networking Break & Visit with Exhibitors**

**11:00 am – 12:00 pm**

**Concurrent Breakout Sessions**

***Agility at Scale: A Roadmap for Global Marketing Teams***

Marketers within global organizations know the pain points that can stem from the sheer size of an operation – things can move at a glacial pace. But agility is possible with the right team framework. This session will offer attendees best practices for developing a global marketing organization that blends both centralized and regional components, minimizing waste and ensuring consistency, relevancy and agility across local efforts.

*Speaker:*

*Michael J. Collins, Managing Director, Services Delivery and Chief Marketing Officer, CFA Institute*

***Case Study: Lessons Learned on Implementing Agile***

Are you considering implementing agile marketing at your firm? Maybe you've already started implementing it? Come hear about how one investment management firm has been implementing agile, the implications across IT and marketing, and tips on what to do - and what not to do - to get the most out of the agile framework for your firm.

*Speaker:*

*Steven King, Director of Product Marketing, American Century Investments*





### **AAA – Automation, Agility and AI (Roundtable)**

Technology is moving us into a new environment where it is taking over the labor-intensive functions of many marketing tasks and leaving marketers to focus on making intelligent insights to get the most out of their campaigns. Discuss with peers how tools like SharePoint, Marketo, Buffer, Salesforce Einstein and others are helping to change the job of being a marketing professional.

*Moderator:*

*Deb Well, Director of E-Business, Harbor Capital Advisers, Inc.*

### **Principles for Responsible Investment**

The PRI is the world's leading proponent of responsible investment. Nearly 1,700 investors have become signatories, from over 50 countries, representing \$62 trillion. Has your firm? This is a great opportunity to hear firsthand from PRI representatives.

*Speakers:*

*John Du, Project Manager US, PRI*

*Carol Jeppesen, Senior US Network Manager, PRI*

*Chris Fowle, Head of Americas, PRI*

**12:00 pm – 1:00 pm**

**Lunch & Visit with Exhibitors  
PAICR ACE Award Presentation**

**1:00 pm – 2:00 pm**

**General Session**

### **CMO Panel**

Top investment management CMOs discuss topics in agile marketing and how they have successfully navigated their marketing plans and strategies in the current disruptive marketing climate.

*Moderator:*

*Henry Detering, Managing Director, Global Marketing, Lazard Asset Management*

*Panelists:*

*Farnaz Maters, Senior Director, Marketing, Principal Global Investors*

*David Master, Chief Marketing Officer, Janus Henderson*

*Rob Pinkerton, Chief Marketing Officer, Morningstar*