

NAVIGATING

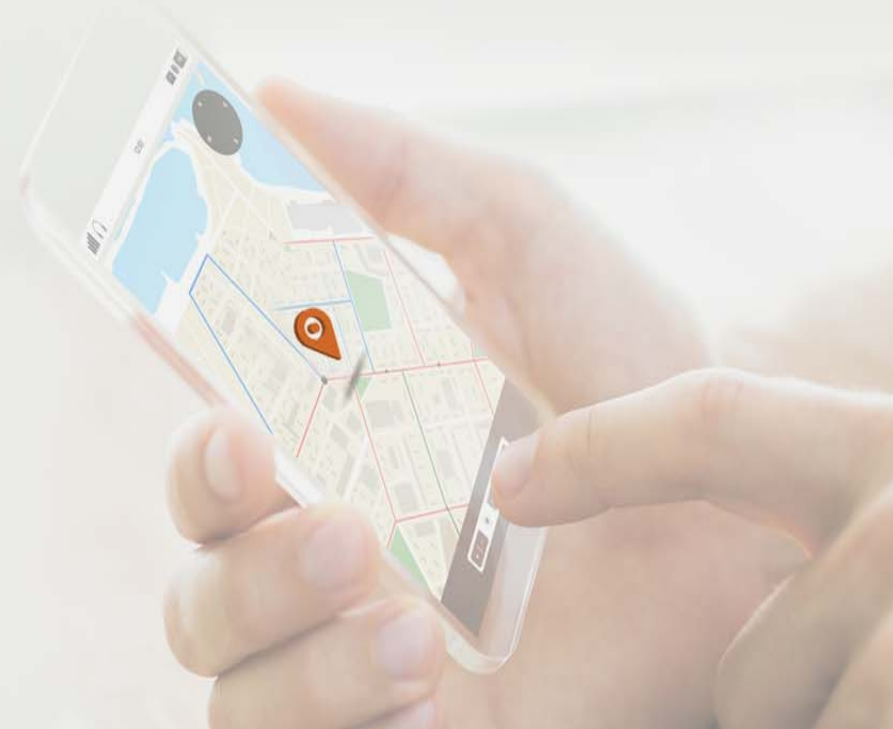
THE EVOLVING MARKETING LANDSCAPE

2016
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Leveraging Technology to Promote Team Efficiency



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Key Leverage Points For Small Teams

- * Documentation
- * Collaboration
- * Communication
- * Sales Automation
- * Marketing Automation

Documentation

- * Small Teams need to have critical processes documented even more than Large Teams
- * Use for Cross Training – and Training
- * Calendar annual review off cycle to check for updates
- * Tool Examples:
 - * Snag It
 - * Snipping Tool (Windows) or Grab (Mac)
 - * Nimbus Screenshot (Chrome, Firefox, or desktop app)
 - * More examples [here](#)

Collaboration

- * Needed when your Team of one expands to two – or three
- * Continuity of critical tasks - you never know when fate will strike
- * Multiple editors – process tracking – version control
- * Tool Examples:
 - * SharePoint
 - * Asana
 - * Microsoft OneNote
 - * More examples [here](#)

Communication

- * Get out of Email – Now! You will thank me latter
- * Why Forms are your Best Friend
- * Example of where you can build:
 - * SharePoint
 - * Your CRM
 - * Outlook Templates
 - * [Outlook/Access](#)

Sales Automation

- * Static Presentations?
- * Create Libraries – on drives, on intranet, in CRMs
- * Self-Serve When Possible
- * Examples of Tools
 - * SS&C Varden
 - * Wheelhouse Analytics - Admiral
 - * Accent Present/Accent Connect

Marketing Automation

- * Automation of marketing material creation cuts down on time to approval, gives time for quality control
- * Examples for presentations and marketing collateral:
 - * Qvidian and Proposal Software – not just for RFPs
 - * Seismic and Quark and Kurtosys
 - * Morningstar Direct
 - * Live Office (Business Objects Reporting Microsoft Integration)
 - * Build it in-house! Data Warehouse + XML