



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, President and Lead Trainer, AgileSherpas

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

NYLIM's Journey to Complete Digital Transformation

New York Life Investment Management wanted to go under a complete digital transformation to save time and money on finding and printing documents their sales team needed every day. They struggled with delivering the right content at the right time for their prospects. By adopting Seismic they were able to fully automate their materials and the platform across all of their different channels from email and videos to physical mailing and online chat. Instituting this change globally was a challenge and Amit Pandya will share lessons on:

- Getting the right people in the room to expand your use of Seismic
- Integrating across a variety of tools including Eloqua, Eloqua Profiler, Salesforce, and more to kick automation to the next level
- Considerations to plan successful improvements to your own usage of Seismic by collecting feedback from your users

Speaker:

Amit Pandya, New York Life Insurance Company

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, President and Lead Trainer, AgileSherpas

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:

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