



MONDAY, NOVEMBER 7, 2016

7:30 am – 9:00 am Registration and Breakfast

9:00 am – 9:30 am Welcome by Conference Co-chairs & Introductions from Sponsors/Exhibitors

Conference Co-chairs:

Imani Panton - RFP Unit Manager at ICMA-RC

Michael Adelman – Head of Creative at Lazard Asset Management

Patti Ernst – Channel Marketing Director at Invesco

9:30 am – 10:45 am General Session

The Passion Conversation: Sparking & Sustaining Word of Mouth

Passion is a circular relationship. It drives customers to fall in love with brands and it drives brands to fall in love with customers. Drawing from the latest wonky academic research and a career of leading edge marketing expertise, Moore reveals the 3 motivations for why people talk about companies and share their love for brands. He also gives businesses advice for how to design brand stories that spark and sustain sales-driving word-of-mouth marketing. This presentation is based on ideas and stories from the business book, THE PASSION CONVERSATION.

Speaker:

John Moore - Strategy Conductor at Brains on Fire, author of The Passion Conversation: Understanding, Sparking, Sustaining Word of Mouth Marketing.

10:45 am – 11:30 am Networking Break & Visit with Exhibitors – Sponsored by Boston Bureau Productions

11:30 am - 12:30 pm Concurrent Breakout Sessions

Motivating Your Marketing Team (Roundtable)

So your team no longer has the enthusiasm and drive it once had. Perhaps your team is burned out and needs a boost. If you've ever experienced challenges motivating your marketing team, then you're in good company. It's a common issue, but one that can be solved. This roundtable session will provide a forum for managers, team leaders, and supervisors to discuss the issues of motivation for marketing teams, and how to overcome them. It will also provide an opportunity to share practical steps and approaches for improving the level of motivation and team involvement.

Moderator: Susan Lee – Design Team Lead at Lazard Asset Management

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THE EVOLVING MARKETING LANDSCAPE

Using Client Data to Inform the Buyers' Journey

All parts of the organization collect data on clients and prospects. Some of this data may be stored in CRM, and some may be in other locations. How can marketing provide this information to sales in way that is intuitive and helpful in the sales process?

Speaker:

Aundrea Heisey - Product Marketing Director, Financial Services at Seismic, Inc.

Maximizing Marketing Team Resources

It can be very challenging for marketing teams to keep up with the demands facing most companies today. This is especially true when the team is small and already being stretched to the limit. In order to be successful, marketing teams must be effective in how team resources are being utilized.

Speakers:

Kari Brett – Senior Marketing Manager at Principal Global Investors

Steven King - Director of Product Marketing at American Century Investments

Increase AUM with Marketing Automation

For too long, financial services marketing departments have been seen as a cost center. It's time to prove—and improve—marketing's contribution to the bottom line using marketing automation and metrics that matter. In this session we will discuss how segmentation strategies, lead scoring, and marketing analytics can help you prove ROI on marketing programs and grow AUM.

Speaker:

Joe Paone - Manager, SMB Marketing at Marketo

Building a Successful Team

What factors go into creating a team that, as a whole, successfully meet goals, can think and move in a one direction? What are the must haves to keep your team focused on the larger picture? What goes into creating a stable environment? Take away tips on how to build a team that will succeed.

Speaker:

Michael Adelman – Head of Creative at Lazard Asset Management



Search Engine Optimization (SEO) – How to Use it to Your Advantage

Organic (non-paid) SEO is free. How can it get any better than that? Well, it takes time and effort to develop. Paid SEO can provide a more targeted approach, and can be tracked to show return on your investment. But it can be complex and increased competition could drive up costs. Attend this session to hear how other marketers implement SEO into their websites.

Panelists:

Michelle Lindenberger - Head of Marketing & Women in Finance at Security Traders Association

Binna Kim - President and Co-Founder at Vested

Dylan Zurawell – Vice President, Marketing at Investopedia

12:30 pm – 1:45 pm

Lunch & Visit with Exhibitors

1:45 pm – 3:00 pm

General Session

CMO Roundtable

The marketing heads of three leading asset management firms will discuss the ways in which they and their organizations are adapting to today's rapidly-changing marketing environment.

Panelists:

Maureen Bromwell - Chief Marketing & Strategy Officer at Northern Trust Asset Management

Henry F. Detering, CFA - Managing Director, Global Marketing at Lazard Asset Management

Neil Siegel - Co-Head of Client Group at Delaware Investments

Moderator:

Tom Mulligan - Director, Product Management and RFP at Brandes Investment Partners

3:00 pm – 3:45 pm

Networking Break & Visit with Exhibitors – Sponsored by RIA Database

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THE EVOLVING MARKETING LANDSCAPE

3:45 pm – 4:45 pm

Concurrent Breakout Sessions

Leveraging Technology to Promote Team Efficiency

Technology can be the marketing and communications professionals' "best friend" or "worst enemy". If leveraged properly, the efficiencies gained by using technology the right way can make all the difference in meeting deadlines and balancing priorities. Find out how to get the most out of the tools available to maximize your production process and lessen the stress of hectic quarter ends.

Speaker:

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

Developing Marketing Teams with Advanced Skill Sets

In today's competitive marketing landscape, teams need advanced skillsets to order to meet the increasingly high expectations of clients. The skillsets of the marketing teams must not just keep up with the current demands, but must anticipate the future demands of the marketplace. This session will provide information, steps and practical approaches for enhancing the skillsets of marketing teams. We will share how by advancing the skillsets of marketing teams, you can add value to your company while providing professional development opportunities.

Speaker:

Kari Brett – Senior Marketing Manager at Principal Global Investors

What Do I Do with All This Data? (Roundtable)

From user data such as open rates, click rates, page views, and downloads to our own internal operation data, the modern marketer is inundated with data. But who is using it effectively to drive their decision making process. In this roundtable attendees will be asked to share their successes, failures, and frustration with the influx of "Big Data".

Moderator:

Michael Adelman – Head of Creative at Lazard Asset Management

NAVIGATING

THE EVOLVING MARKETING LANDSCAPE

Marketing The “Less Human Is More” Approach - Robo Advisors

With the consistent demand for advancements in technology, it is no surprise that each day, more things in the world are automated. As new generations of consumers grow up, they begin to expect the same from their financial advice. Historically firms have promoted the “hands on,” customer relations experience, a change to this methodology can be daunting. This case study will review what is robo-advising and how to effectively market it to the younger generation.

Speaker:

Daniella Boni – Marketing Director at Callan Capital

Is Your Social Media Really Social?

Social media is a consistently trending topic. Everywhere you look, there are references to social media – who is using it, how, what are they saying. And in this day and age, companies cannot afford not to have a social media presence. But in that same light, companies cannot afford to make mistakes on social media either, because the world is watching. Join us to discuss best practices for social media marketing, such as LinkedIn and Twitter, and provide your thoughts on how to best promote your marketing message in 140 characters or less.

Panelists:

Dan Connell – Managing Director at Greenwich Associates

Julia Robinson – Marketing Associate at Principal Global Investors

Omri Ben-Amos - VP, Marketing at ClearBridge Investments

Moderator:

Menaka Thillaiampalam – Head, North America Financial Services Marketing at LinkedIn

4:45 pm – 5:00 pm

Closing Remarks

Conference Co-chairs:

Imani Panton - RFP Unit Manager at ICMA-RC

Michael Adelman – Head of Creative at Lazard Asset Management

Patti Ernst – Channel Marketing Director at Invesco

5:15 – 7:00

Cocktail Reception



TUESDAY, NOVEMBER 8, 2016

8:00 am – 9:00 am Registration and Breakfast

9:00 am – 9:15 am Welcome by Conference Co-chairs

Conference Co-chairs:

Imani Panton - RFP Unit Manager at ICMA-RC

Michael Adelman – Head of Creative at Lazard Asset Management

Patti Ernst – Channel Marketing Director at Invesco

9:15 am – 10:30 am General Session

Evolving Your Marketing Strategy in a Digital World

Over the last two decades marketing strategies have been evolving from traditional channels to more social and behavioral driven channels. This shift has brought on several challenges and opportunities in investment management marketing. Hear how institutional marketers can successfully leverage the benefits of both strategies in this ever-changing environment.

Speaker:

Dominica Ribeiro - Head of Institutional Marketing, North America at State Street Global Advisors

10:30 am – 11:15 am Networking Break & Visit with Exhibitors – Sponsored by Pensions and Investments

11:15 am – 12:15 pm Concurrent Breakout Sessions

Developing a Marketing Organization to Power an Engaging Blog

Many marketing teams have snapped on ancillary capabilities to place content into a blog. The industry leaders have taken an integrated approach to build Marketing around relevant thought leadership that utilizes a blog as the primary platform to transfer that thought leadership to clients and prospects. Attend this session to understand the necessary “basics” for a relevant and well-executed blog.

Speaker:

Anu Heda, Co-founder and Partner with Naissance

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THE EVOLVING MARKETING LANDSCAPE

Reporting: Centralized or Decentralized? (Roundtable)

This roundtable will focus on how data is gathered and shared within your firm. Is data stored in a centralized or decentralized manner? What are the advantages and disadvantages of each approach? How is data distributed and accessed?

Moderator:

Michael Kendall – Vice President of Strategic Relationships at Satuit Technologies

Mobile Marketing

Gone are the days of consumers gathering data from books, newspapers and television. In today's virtual world, consumers instantly turn to their smart phone or tablet for quick and easy information gathering. But what happens when your marketing materials are designed for the computer screen and do not easily translate to the smaller screen? It is easy to lose viewers when your information isn't visible. In this session, listen to tips for modifying marketing materials, from websites to emails, apps to videos, to fit any size screen.

Speaker:

Tucker Slosburg – President at Lyceus Group

Team Productivity and Effectiveness (Panel)

In this panel, both managers and team members discuss real life experiences where team work results in goals that are met, what contributed towards the collective success, and how to deal with missteps and defeats.

Panelists:

Tom Mulligan - Director, Product Management and RFP at Brandes Investment Partners

Ray Lewis – Global Marketing Communications Manager at Brandes Investment Partners

Imani Pantan - RFP Unit Manager at ICMA-RC



RFP Team Data Analysis: Looking Beyond Volume

RFP teams are under constant pressure to keep up with volumes, and reporting on increases (and decreases) can be a key component in ensuring the proper resources. But what data points beyond volumes are most informative? How can this information be effectively shared with senior management and sales so they can better understand how to utilize RFP resources?

Speaker:

Cathy McLagan – Head of RFPs and Consultant Databases at Invesco

Personalizing Your Message: It's Not What You Want to Say That Counts, It's What They Need to Hear

Marketing in today's digital age presents us with many opportunities to engage our clients and prospects, but how do you differentiate your firm and your products in a crowded marketplace? Start talking to them as individuals, not as asset classes and offer them the opportunity to create their own relevance.

Speaker:

Stan Adler - Owner, Stan Adler Associates

12:15 pm – 1:15 pm

Lunch & Visit with Exhibitors

1:15 pm – 2:15 pm

General Session

What's Your UBER?

This energetic and informative session will help provide the keys in researching and determining what future disruption is coming your way. Technology is the #1 disrupter, but it may be some other form of disruption. Just look at the taxi, real estate, publishing and music industries. Over the last five years, disruption has transformed those industries, putting the organizations at risk for competing. The question is... Do you know what may be lurking your way that is going to create havoc in your industry? Tom Morrison will share various forms of disruption that are going to create havoc in many industries and organizations connected to them as well as what your organization needs to be doing to embrace these shifts.

Speaker:

Tom Morrison - CEO of MTI Management and Authority on Associations

NAVIGATING

THE EVOLVING MARKETING LANDSCAPE

2:15 pm – 3:15 pm

Concurrent Breakout Sessions

Cross Training Your Team

At some firms, the in-house marketing group is small, requiring team members to wear many hats and be ready to help out when the work requires all hands on deck. This panel discussion will touch on the importance of cross training; skills that should be developed; advantages of cross training; tips on how to implement successful coaching initiatives; and the expected end result.

Panelists:

Ray Lewis – Global Marketing Communications Manager at Brandes Investment Partners

Katie Henry – Production Manager at Brandes Investment Partners

Cathy McLagan - Head of RFPs and Consultant Databases at Invesco

Why You Should Be Using Video as Part of Your Marketing Strategy (Roundtable)

From tutorials to social media posts, video is more popular than ever as a way to garner attention and enhance reputation. Discover the benefits of using videos as part of your marketing strategy.

Moderator:

Patti Ernst – Channel Marketing Director at Invesco

Managing and Leading: Skills for Being a Great Boss

A great team doesn't come together without a great boss. But higher demands, tighter budgets, and new technology have changed what it means to be successful in leading a team. In this session, we'll talk about the skills you need to be the leader you want to be: a highly organized communicator who navigates challenges creatively, and who is respected by your team and upper management alike. We'll also identify the #1 enemy of successful teams and how to defeat it.

Speaker:

Kylelane Purcell – President at Purcell Communications

NAVIGATING

THE EVOLVING MARKETING LANDSCAPE

Data-driven Content

Content is only king if you're creating the right content and putting it in front of the right people. And, online today engaged consumers of content are some of your best marketing assets. Thoughtful data analysis can be used to make sure that your content is working to help generate high-quality, engaged traffic that will ultimately convert to leads. Learn how to use testing and analysis to ensure you're getting the most from your content investment.

Speaker:

Dan Scholz - Senior Vice President Digital Marketing at Lazard Asset Management Asset Management

RFP Content Management: Promoting Efficiency Through Software (Panel)

Each client is unique but the questions asked during an RFP process often are not. In this panel, RFP experts and consultants discuss the efficiency gained with RFP software and standard language. They will also discuss strategies for maintaining current and accurate language along with which information should be standard and when it is better to customize.

Panelists:

*Wendy Cheng-Wong – Account Manager at Proposal Software
Beth Sherring - Institutional Communications at Brown Advisory
Kari Brett - Senior Marketing Manager at Principal Global Investors*

3:15 pm – 3:30 pm

Closing Remarks and Announcement of PAICR ACE Winners

Conference Co-chairs:

*Imani Panton - RFP Unit Manager at ICMA-RC
Michael Adelman – Head of Creative at Lazard Asset Management
Patti Ernst – Channel Marketing Director at Invesco*