

**AGILE
MARKETING
IN THE
AGE OF
DISRUPTION**

BUILD.



MEASURE.



LEARN.



REPEAT.



PAICR | THE ASSET
MANAGEMENT
MARKETING
ASSOCIATION
2017 ANNUAL CONFERENCE

The Westin Grand Central | Nov.13&14, 2017

Agility at Scale: A Roadmap for Global Marketing Teams



Michael Collins, CMO and Managing Director
CFA Institute

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.

INTRODUCTION

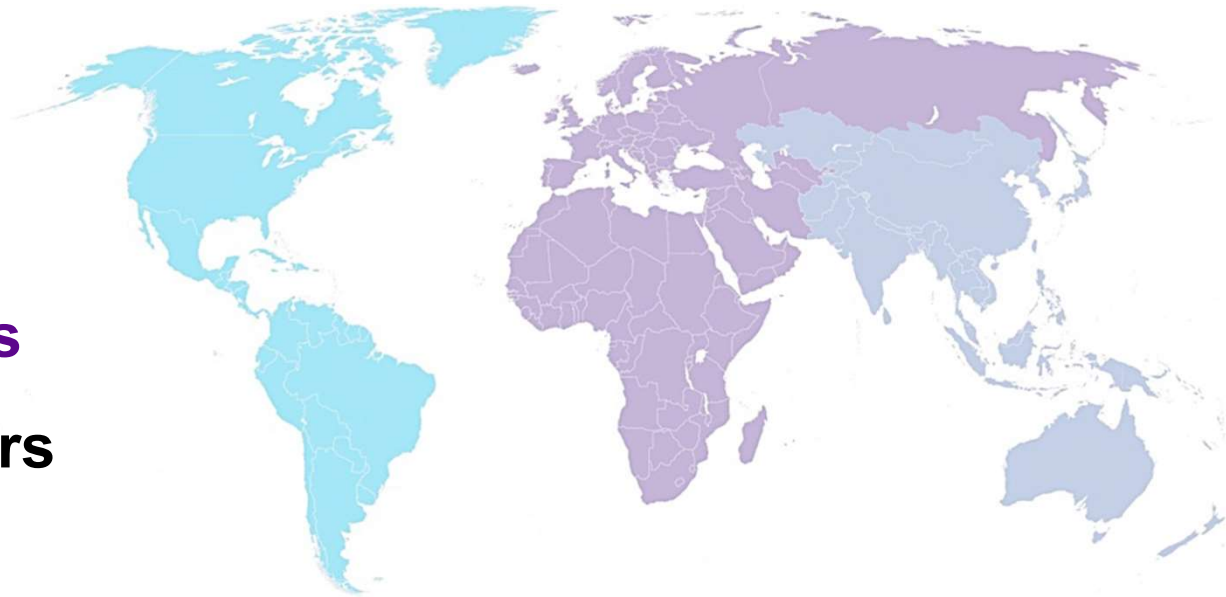
CFA Institute is the global association of investment professionals that sets the standard for professional excellence and credentials.

3 Regions

149 Societies

163 Countries & Territories

145,000 CFA Charterholders



IN THE BEGINNING

“We are from headquarters and we are here to help you.”

- **Centralized system**
- **No regional autonomy**
- **Control, not discipline**
- **Team not aligned with business needs**

THREE SECRETS OF AGILITY



MINDSET



**TEAM
STRUCTURE**



INTEGRATION



MINDSET

How can we help ourselves help our stakeholders?



MINDSET

- **Service Orientation**
- **Client/Collaborator Culture**
- **Discipline, Not Control**
- **Transparency**





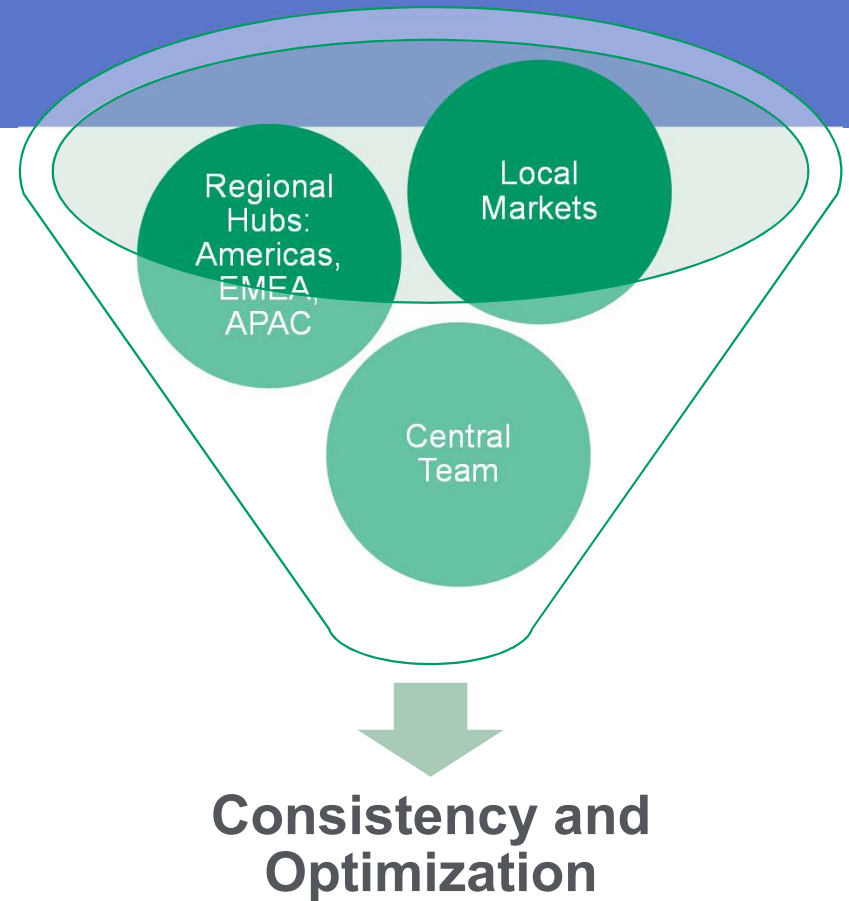
TEAM STRUCTURE

Creating accountability, filling gaps, meeting stakeholder needs



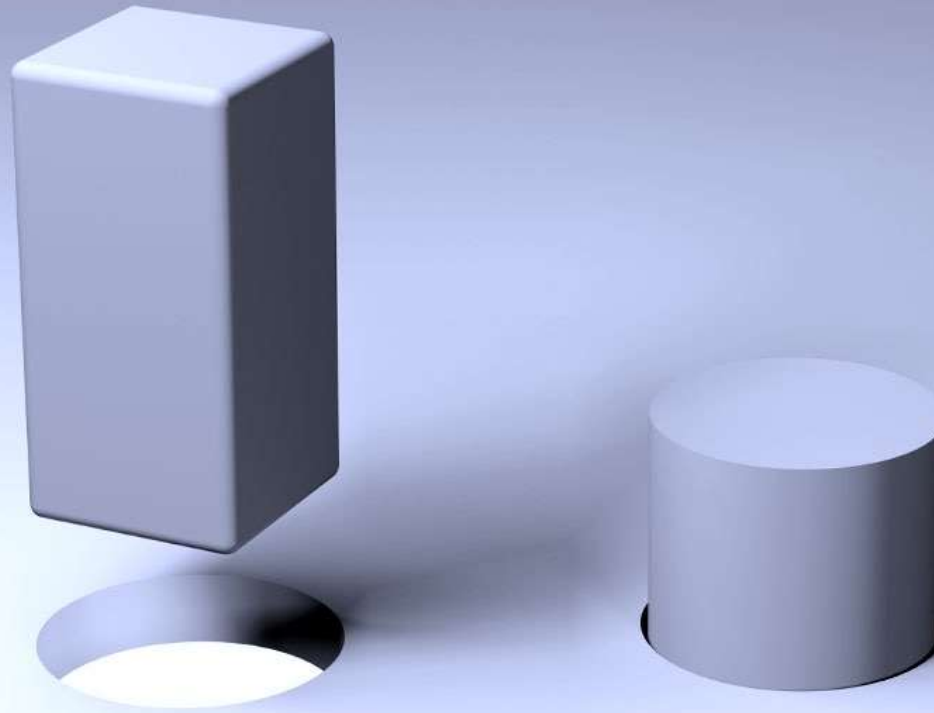
TEAM STRUCTURE

- **Accountability**
- **Identify gaps**
- **Staff for expertise**
- **Align with stakeholders**





IN PRACTICE



CFP®



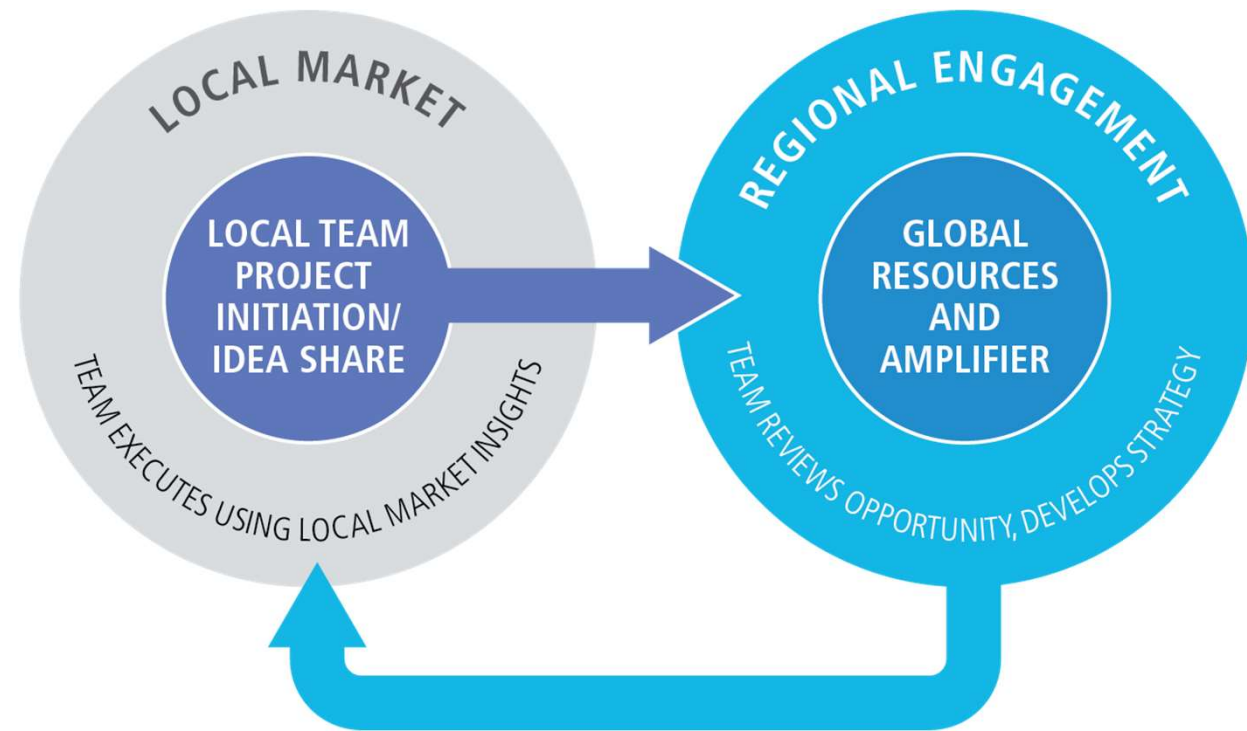
GLOBAL & REGIONAL INTEGRATION

Collaborating for continual optimization



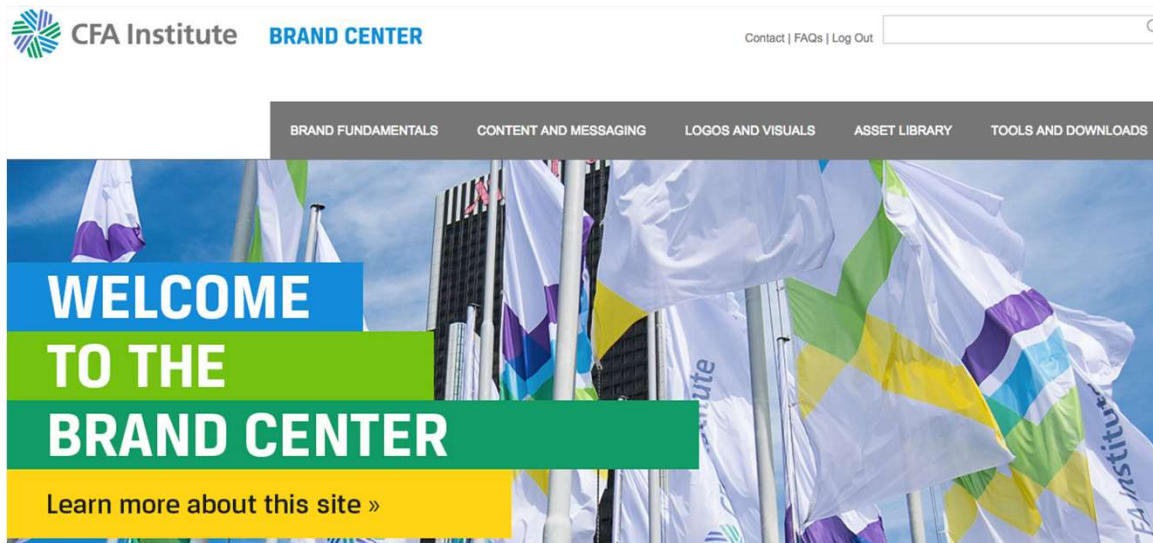
GLOBAL & REGIONAL INTEGRATION

- **Global Champion, Locally Relevant**
- **Variable Model**
- **Regional Push**





IN PRACTICE



HOW-TO GUIDE: USING THE SOCIETY MARKETING RESOURCES

Updated January 2016





CULTURE SHIFT

- **New approach to communication**
- **Stakeholder focus**
- **Continual feedback and improvement**



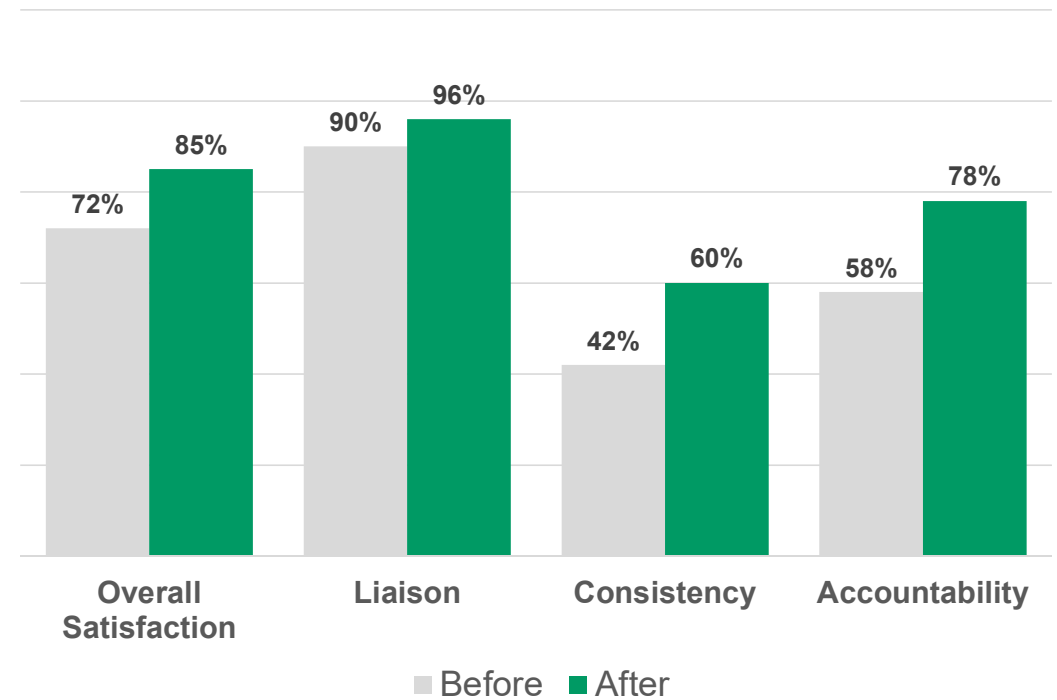
OUTCOMES

How will we know if it worked?



OUTCOMES

- **Impact**
- **Efficiency**
- **Control**



QUESTIONS?