

**7:15 am – 8:00 am**

**Registration and Full Breakfast**

**8:00 am – 8:15 am**

**Welcome by Conference Co-Chairs and Introductions of Sponsors/Exhibitors**

*Conference Co-Chairs:*

*Lisa Williams, Independent Consultant*

*Lauren Torres, Senior RFP Specialist – Invesco*

**8:15 am – 9:15 am**

**General Session – Keynote Speaker**

***Where Does Positioning Come From?***

Where does positioning come from? How do your aspirations affect your positioning? Proposals should stand for something. They should matter. They are inherently aspirational. But are they your aspirations, your company's, or your customer's? Where should these aspirations come from? Is it company executives, sales, marketing, or proposal writers who define them? And how do you turn that into ink on paper? Where is the line between your dreams and the proposal as a document? How do you translate that into how you approach the job of responding to RFPs? And how do your aspirations impact your win rate?

*Speaker:*

*Carl Dickson, Founder – [captureplanning.com](http://captureplanning.com) and PropLIBRARY*

**9:30 am – 10:30 am**

**Concurrent Breakout Sessions: Supernova: How to Shine in Your RFP Role**

***RFP "Careerist": The Long-Term Career as an RFP Writer ▲***

What does it mean to have a career as an RFP Writer? What are the benefits, and what are the challenges? What makes a good senior RFP Writer, and how do you get there? What are some of the career options for RFP Writers in it for the long-haul? These long-time RFP professionals will discuss how they got where they are, and why they love it.

*Speakers:*

*Sydney Blackett, Firm Language Specialist – Invesco*

*Jamie Williams, AVP, Senior RFP Writer – Voya Investment Management*

***Your RFP Start: Tips for Beginning Your RFP Role ▲***

So you've just joined the RFP Team, and now you need to know how to get ahead and make yourself, and your team, successful. This session will help you learn some of the tricks of the RFP trade, and help you become a star right from the start.

*Speakers:*

*Isabel Han, RFP Analyst – Voya Investment Management*

*Clay Whitaker, Associate RFP Specialist – Invesco*

***Networking Within Your Company and Industry ▲■***

This small-group roundtable will explore the best ways for RFP writers to network effectively, both within their own firms and with fellow professionals in the industry.

*Speaker:*

*Stewart Dier, Senior Managing Director – Dier Associates*

***Navigating the Global Firm: Challenges and Benefits ▲■***

Preparing RFPs for international clients can be a real challenge. But in today's increasingly global world, the RFP writer who can successfully navigate that challenge can be the team's superstar. Speakers with extensive international RFP experience will discuss the ins and outs of working globally.

*Speakers:*

*Sean Keltie, Director of Global RFP – Franklin Templeton Investments*

*Mark Nelson, Sr. Investment Product Advisor/Team Leader for Fixed Income RFP Team – Principal Global Investors*

**10:30 am – 11:00 am**

**Networking Break and Visit with Exhibitors**

**11:00 am – 12:00 pm**

**Concurrent Breakout Sessions: The Shooting Star:  
Navigating Your Career**

***Making a Smooth Transition from RFP Writer to Manager ▲■***

They finally made you the RFP Team Manager. Now, how do you shine and succeed in the role? Dealing with former peers, adjusting to a new level of management, and at last getting to implement all those good ideas you've always had takes finesse and skill. In this small-group roundtable, a senior RFP professional who's been through it all will talk about what she's learned over the years.

*Speaker:*

*Beth Mosley, Sr. RFP Writer – Principal Global Investors*

### **Career Paths: From RFPs to Other Roles ▲**

Being an RFP professional can give you the chance to work with a variety of people in other roles, and some RFP writers find they are attracted to different fields, including sales, product, or other areas of marketing. These panelists will talk about how they successfully made the move into other careers.

#### *Moderator:*

*Beth Sherring, Institutional Messaging – Brown Advisory*

#### *Speakers:*

*Laurens Clarke, Product Specialist – Voya Investment Management*

*Drew Donohue, Chief Compliance Officer – Principal Global Investors*

*Lauren Gallagher, CFA, Director – BlackRock Global Consultant Relations Group*

*Michael Mellor, Director of Marketing - Pryor Cashman LLP*

*John Davis, U.S. Financial Intermediaries Business Development – Brown Advisory*

### **The Wide World of RFP Career Types ▲■**

Writing RFPs in one kind of firm or team can be a very different experience from doing the same job in a different environment. From the one-man shop to the huge team, from cubicle world to the virtual employee model, this discussion will focus on what to expect, and what to look for in your next position.

#### *Moderator:*

*Dorothy Friedrich, Institutional Client Group, RFP Manager – AXA Investment Managers*

#### *Speakers:*

*Maggie Mair, RFP Manager – Invesco*

*Melanie Murray, Marketing Manager – Baillie Gifford*

**12:00 pm – 1:30 pm**

**Lunch and Visit with Exhibitors**

**1:30 pm – 2:30 pm**

**Concurrent Breakout Sessions: Meteor Showers: Harnessing RFP Tools for Success**

***Content Management: Implementing Best Practices With and Without a Vendor System* ▲ ■**

A discussion focused on best practices in content management, including tips and hints for successfully storing RFP language and ensuring content is up to date, whether your firm is using a content management system or not.

*Moderator:*

*Sydney Blackett, Firm Language Specialist – Invesco*

*Speakers:*

*Erin O'Brien, Firm Reporting Manager – Wellington Management*

*Ailin Wang, Vice President – Lazard Asset Management*

*Bill Walsh, RFP Manager – Charles Schwab & Co.*

***Working Effectively with Stakeholders: Getting Buy-in on RFP Language and Necessary Time with SMEs* ▲ ■**

Getting a final RFP across the finish line can be challenging when multiple stakeholders are involved. In this small group roundtable, seasoned RFP Managers will discuss methods to corral all parties involved to ensure that accurate information is provided, and on time, to meet that final deadline.

*Speakers:*

*Maggie Mair, RFP Manager – Invesco*

*Stewart Dier, Senior Managing Director – Dier Associates*

***Effective Processes: RFP Best Practices* ▲ ■**

What makes core RFP processes effective? Why do you need a stated process at all? And how do you measure the success of your process? This panel will look at those questions from the perspective of an RFP consultant, a Continuous Improvement (LEAN) Professional, and a real-life RFP Manager.

*Moderator:*

*Ellen Jones, Content Manager, Marketing Services – Nuveen*

*Speakers:*

*Kylelane Purcell, President – Purcell Communications*

*Kent Jones, Director, Business Strategy - TIAA*

**2:30 pm – 3:30 pm**

**Concurrent Breakout Sessions: Great Galaxies: Building a Stellar RFP Team Structure**

***Building a Superstar RFP Team: Recruiting & Training* ■**

Finding and training really good RFP writers can be hard, and ultimately it's the quality of the team members that make or break an RFP team. This session will look at how to identify and bring onboard the best people, and how to train the people you've got to be the best team.

*Speakers:*

*Colleen Dunne, Head of RFP – Voya Investment Management*  
*Jamie Lee, Director of Institutional Communications – Harbor Funds Distributors*

***The Varied Structures of RFP Teams* ▲ ■**

RFP teams can be structured in a variety of ways, depending on the size and type of firm and team. The panelists will explore what they've learned and share their experiences working in different circumstances.

*Speakers:*

*Andrea Mullins, RFP Manager – Artisan Partners*  
*Candice Sharar, Marketing Manager – Chandler Asset Management*  
*Jillian Stein, Director – BlackRock Funds*

***Shooting for the Stars: Quantifying Quality* ▲ ■**

Before proposal quality can be quantified, it has to be defined – and that's where this discussion will start. Then the session will delve into the nuts and bolts of how quality is measured, and the implications for what it means about the proposal process. The workshop will lead to a direct and quantifiable link between how proposal quality is defined and win rate, with some additional discussion about how that impacts proposal resource allocation and return on investment.

*Speaker:*

*Carl Dickson, Founder – [captureplanning.com](http://captureplanning.com) and [PropLIBRARY](http://PropLIBRARY)*

***Quantifying and Defining Success: How to Track RFP Progress and Outcomes*** ▲ ■

This small-group roundtable will look at effective tracking metrics for RFP teams across multiple industries, including how to gather and document information on the success of RFP-related bids, as well as intelligence for your firm's sales and product development discussions.

*Speaker:*  
*Lisa Williams, Independent Consultant*

**3:30 pm – 4:00 pm**

**Networking Break and Visit with Exhibitors**

**4:00 pm – 5:00 pm**

**General Session – Consultant Panel**

***RFP End Users: What They Want, Love, and Hate***

How do clients and consultants evaluate your RFPs? How can you make your RFP stand out and win the business? What should you avoid in preparing your RFPs? In this session, consultants who review RFPs will talk about how they interact with their clients, and what they say makes an RFP successful.

*Moderator:*  
*Stewart Dier, Senior Managing Director – Dier Associates*

*Speakers:*  
*John Burns, CFA, Managing Director – Pension Consulting Alliance*  
*Michael Fulvio, Managing Director – Rocaton Investment Advisors*  
*Michael Wright, Senior Vice President – Segal Rogerscasey*

**5:00 pm – 5:15 pm**

**Closing Remarks**

**5:15 pm – 7:15 pm**

**Informal Reception/Networking**

*Location: Cambridge Room*

***Breakout Session Key:***

- *Relevant for RFP Managers*
- ▲ *Relevant for RFP Writers*

*Please note that this key is provided as an indicative guide only. Conference attendees are welcome to participate in any breakout session regardless of current role.*