

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, RFP Manager, ClearBridge Investments
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 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, RFP Manager – 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, RFP Manager – 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

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, Manager, RFP – Invesco

Melanie Murray, Marketing Manager – Baillie Gifford

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

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, Manager, RFP – 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

***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 and 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, RFP Manager, ClearBridge Investments

3:30 pm – 4:00 pm

Networking Break and Visit with Exhibitors

4:00 pm – 5:00 pm

General Session – Consultant/Plan Sponsor 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:

Michael Fulvio, Managing Director – Rocaton Investment Advisors

Michael Wright, Senior Vice President – Segal Marco Advisors

Susan Stang, Director, Investment Administration - New York City Teachers' Retirement System

5:00 pm – 5:15 pm

Closing Remarks

5:15 pm – 7:15 pm

Informal Reception/Networking

Location: West 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.