



**7:15 am – 8:00 am**

**Registration and Full Breakfast**

**8:00 am – 8:30 am**

**Welcome Remarks**

**8:30 am – 9:30 am**

**General Session – Keynote Speaker  
The RFP Toolkit: Industry Trends and Outlook**

*Kylelane Purcell – CEO, Purcell Communications*

**9:30 am – 10:30 am**

**General Session  
Evaluating Your Work: Marketplace and Consulting Trends and Outlook**

**10:30 am – 11:00 am**

**Networking Break and Visit with Exhibitors**

**11:00 am – 12:00 pm**

**Concurrent Breakout Sessions**

**RFP 101**

*Ellen Jones: VP, Global Marketing Services, Nuveen  
Anne Farro: Head of Institutional & Client Advisory Business Management, Allianz*

This small group session dives deep into best practices and your own RFP team. Touching on RFP essentials – from Microsoft Word to senior management reports and writer motivation – we’ll facilitate a discussion that will speak to your firm’s specific RFP challenges and successes.

**RFP Fundamentals**

*Stewart Dier: Senior Managing Director, Dier Associates*

What makes a good RFP writer and a successful team? Product knowledge? Writing ability? Customer service? Find out what makes a skillful RFP writer and what training fosters success. Explore best ways to build and structure an RFP team for efficiency, quality and a higher success rate.

**Consultant Database Mechanics**

*Qvidian*

Managing content and data across the myriad of consultant databases is a challenge for most firms. Get some insight for how to give your firm a competitive edge in ways that don’t add more man hours to your day.



12:00 pm – 1:00 pm

Lunch

1:00 pm – 2:00 pm

Concurrent Breakout Sessions

### **RFP 101**

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### **Organizational Dynamics**

*Sean Keltie: Head of Global RFP, Franklin Templeton Investments*  
*Diane Hallett: RFP Manager, Eaton Vance*

Sure, all asset management RFP teams complete RFPs, RFIs and DDQs, but have you ever wondered if there is a better way to share the workload? We'll explore variations of how RFP teams get the most out of where they sit in the organization, how they earn firm visibility and how they provide writers with meaningful career opportunities. Whether you are tackling the institutional vs. retail channel challenge or contemplating outsourcing some of your work, this session gives you valuable insight into what industry peers are doing to leverage organizational opportunities.

### **CRM and RFP Software Case Studies**

*Jen McCarthy: Managing Director, Global Marketing Services, Nuveen*  
*Robert Paz: Nuveen*  
*Beth Sherring, Institutional Messaging, Brown Advisory*

Get ready to take your firm to the next level. Two firms share their experience with integrating their proposal software systems with the CRM system used by sales and client relations. Highlights and pitfalls, this discussion includes the RFP team, internal IT representatives and the proposal software providers.



**2:00 pm – 3:00 pm**

**Concurrent Breakout Sessions**

**The Quality vs. Quantity Dilemma**

*Melanie Murray: Marketing Manager, Baillie Gifford*

How do you ensure excellence when pressure is applied? This session will give RFP writers and managers strategies for maintaining high quality and morale when faced with the inevitable pressure of multiple deadlines and shorter turnaround times.

**Content Management Mechanics**

*Monica McGillicuddy: Content Database Manager, Eaton Vance Management*

Is your RFP base content up to date and positioned to set you apart in a competitive marketplace? This session presents best practices in keeping RFP content fresh with Subject Matter Experts, compliance and brand marketing. Whether you have a dedicated content manager or share this task across RFP writers, explore how you maximize content management and alleviate constant rewriting in live documents.

**The RFP Process and Project Management Skills**

*Kate Prevost: Manager, RFP, Invesco*  
*Kent Jones: Process Excellence Leader*

Plan the work and work the plan – find out how to best evaluate the time and resources needed to get an RFP submitted efficiently. This session explores process efficiency from a Six Sigma perspective with an eye to RFP writer workload and team staffing.

**3:00 pm – 3:30 pm**

**Networking Break and Visit with Exhibitors**

**3:30 pm – 4:30 pm**

**General Session**

**Putting it All Together: RFP Manager Panel Discussion**

*Moderator: Beth Mosley, RFP Manager, Principal Global Investors*  
*Diane Hallett: RFP Manager, Eaton Vance*  
*Sean Keltie: Head of Global RFP, Franklin Templeton Investments*  
*Maggie Mair: RFP Manager, Invesco*

**4:30 pm – 5:00 pm**

**Closing Remarks**

**5:00 pm – 7:00 pm**

**Informal Reception/Networking**