



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
Responsible Investing: Marketplace and Consulting Trends and Outlook

Megan Fielding - Senior Director, Responsible Investing, Nuveen

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: Global Head of Client Relationship Management (CRM), Allianz Global Investors

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

Deirdre Sommerkamp, Manager, Strategic Services, Qvidian
Beth Goonan, Senior Director, Sales, SalesEdge

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

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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

Moderator: Beth Sherring, Institutional Messaging, Brown Advisory

Tammy Dungan, Professional Services Lead & Senior Consultant, Proposal Software, Inc.

Janille Fagundo: Manager, RFP Development, Prudential

Cheryl Feldman: Salesforce Administrator & Strategist, Allianz Global Investors

Get ready to take your firm to the next level! This panel will feature a representative from a proposal software company, a Salesforce expert, and an RFP Team Manager from a firm that has integrated the two systems. Panelists will share the highlights and pitfalls associated with integrating the CRM systems used by sales and client relations with document/proposal management software.

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: Manager, RFP, Invesco

4:30 pm – 5:00 pm

Closing Remarks

5:00 pm – 7:00 pm

Informal Reception/Networking