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17th Annual Conference

Blurred Lines:
The New Marketing Ecosystem

November 16-17, 2015

InterContinental New York Times Square

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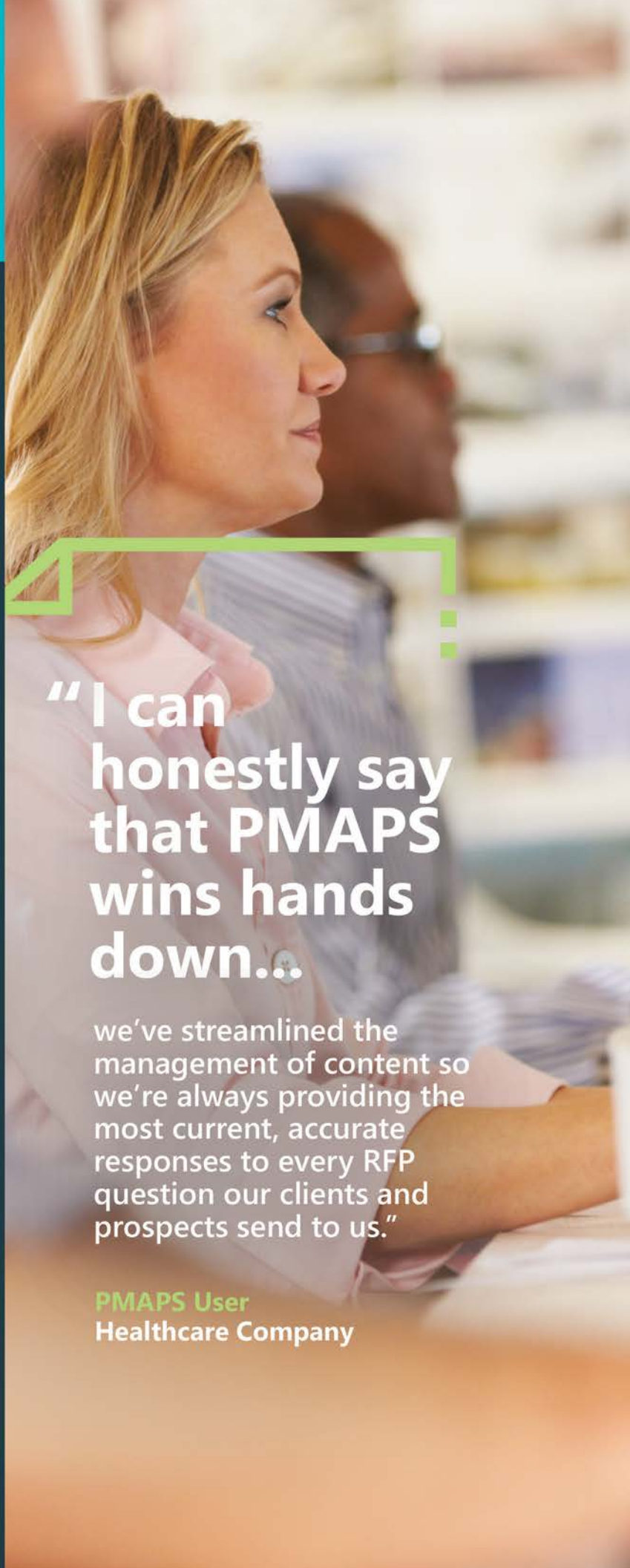

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17th Annual Conference

Blurred Lines:
The New Marketing Ecosystem

Welcome to PAICR's 17th Annual Conference.

Anne Banks

Deb Well

Our theme, "Blurred Lines: The New Marketing Ecosystem," focuses on the evolving and growing responsibilities of marketing. The increasing intersection and partnering of marketing with other functions in the business (sales, compliance, IT, corporate communications) has resulted in blurred lines of responsibility.

This new marketing ecosystem is reflected in our diverse two-day agenda, which includes a total of four keynote and general sessions, as well as multiple workshops and roundtables. All told, the agenda covers a breadth of topics designed to help you and your team successfully navigate the new environment and deliver the best results for your business.

We encourage you to take advantage of the endless opportunities that the Annual Conference has to offer:

> **Participate** – Throughout our two-day agenda, we have a variety of breakout sessions that offer time for you to interact in small groups, ask questions and engage.
>
> **Network** – Use breakfast, coffee breaks, lunch and our Monday evening reception to develop long-lasting connections with your fellow PAICR members. Catch up with your colleagues and make some new friends.
>
> **Visit with Exhibitors** – Our sponsors work with firms like yours on a daily basis and provide solutions to challenges you may currently be facing. Their products and services may offer the right solutions for you. Stop by each booth to understand each of their unique offerings.

We would like to thank PAICR's Annual Conference Planning Committee for their hard work in putting together this exciting conference. PAICR depends on the support of volunteers and we encourage you to join us and help plan our 2016 Annual Conference.

Take the time to fill out our committee volunteer form and get involved today! We know from experience that you will find volunteering with PAICR rewarding, both personally and professionally.

We look forward to learning and engaging with you.

Again, welcome and have a great conference.

Regards,

Anne Banks and Deb Well
Annual Conference Co-Chairs

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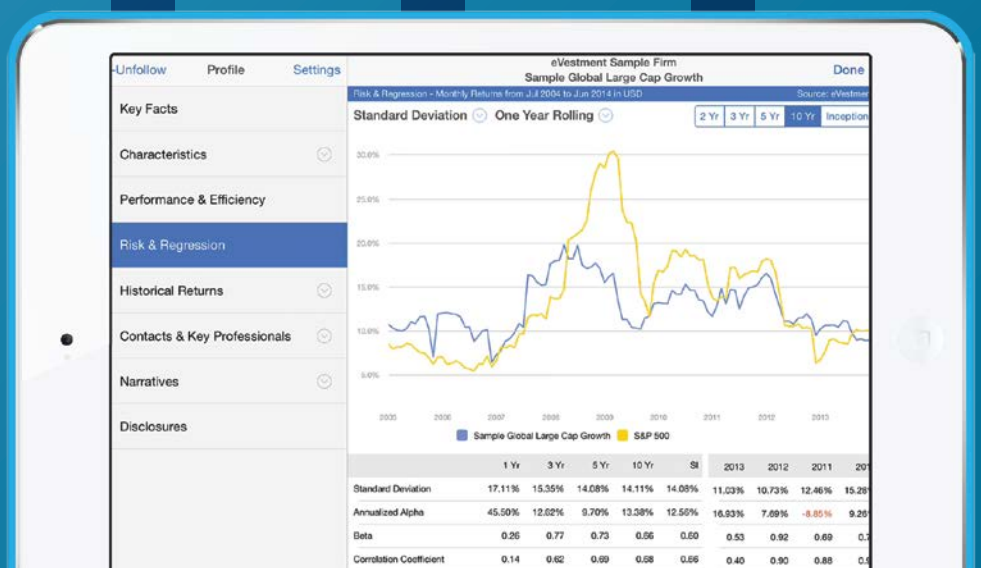

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17th Annual Conference

Blurred Lines:
The New Marketing Ecosystem

Contents

Schedule at-a-Glance **6**

Keynote Speakers **9**

Schedule of Events **11**

Sponsors & Exhibitors **22**

2015 Annual Conference Committee **24**

PAICR Leadership **25**

2015-2016 RFP Survey **26**

Schedule at-a-Glance

Day 1:	Monday, November 16, 2015	
7:30 am - 9:00 am	**Registration and Breakfast**	*Central Park/Gotham Foyer*
9:00 am - 9:30 am	**Welcome and Opening Remarks**	*Gotham Ballroom*
9:30 am - 10:45 am	**General Session** | The (Virtual) Future of Financial Services	*Gotham Ballroom*
10:45 am - 11:30 am	**Networking Break and Meet the Exhibitors**	*Central Park/Gotham Foyer*
11:30 am - 12:30 pm	**Concurrent Breakout Sessions** | *Choose from the following:*	
	Best Practices for Partnering with Compliance	*Riverside Park*
	How a Global Asset Manager is Adapting to Create a World-Class Client Experience	*Gramercy Park*
	Marketing Metrics: Meaningful Measurements for your Business	*Madison Square Park*
	Structuring an RFP Team for Efficiency	*Hudson River Park*
	The Evolution of Portfolio Commentary	*Bryant Park*
	Website Content Management Systems	*Union Square Park*
12:30 pm - 1:45 pm	**Networking Lunch**	*Central Park/Gotham Foyer*
1:45 pm - 3:00 pm	**General Session** | Is it Finally Time for Social?	*Gotham Ballroom*
3:00 pm - 3:45 pm	**Networking Break and Meet the Exhibitors**	*Central Park/Gotham Foyer*
3:45 pm - 4:45 pm	**Concurrent Breakout Sessions** | *Choose from the following:*	
	Best Practices for Jack-of-all-Trades Marketing Heads	*Union Square Park*
	Building a Full Funnel Content Strategy: Connecting Customer Touchpoints to Win More Decisions	*Bryant Park*
	How to Drive Visibility and Alignment of Resources within your Organization to Achieve Proposal Excellence	*Riverside Park*
	Trends in RFP Search Activity	*Gramercy Park*
	What we Uncovered About the RIA Channel – and Actions You Can Take Today to Grow Your RIA Business	*Madison Square Park*
4:45 pm - 5:00 pm	**Closing Remarks**	*Gotham Ballroom*
5:00 pm - 6:30 pm	**Networking Reception**	*Central Park/Gotham Foyer*
7:00 pm	**Dinner Mixer (optional)**	*Meet at Registration Desk*

Day 2:	Tuesday, November 17, 2015	
8:00 am - 9:00 am	**Registration and Breakfast**	*Central Park/Gotham Foyer*
9:00 am - 9:15 am	**Welcome and Opening Remarks**	*Gotham Ballroom*
9:15 am -10:30 am	**General Session |** Life in the Middle: CMO Panel	*Gotham Ballroom*
10:30 am -11:15 am	**Networking Break and Meet the Exhibitors**	*Central Park/Gotham Foyer*
11:15 am - 12:15 pm	**Concurrent Breakout Sessions |** *Choose from the following:*	
	How to Grow your Edge with Institutional Investors	*Gramercy Park*
	Polishing your Consultant Database Profiles for Maximum Visibility	*Hudson River Park*
	Results of the PAICR/P&I Content Marketing Study	*Riverside Park*
	Retail vs. Institutional: What's the Difference Anymore?	*Bryant Park*
	Successful Rebranding: It's All in the Detail	*Madison Square Park*
	We've Been Acquired!	*Union Square Park*
12:15 pm - 1:15 pm	**Networking Lunch**	*Central Park/Gotham Foyer*
1:15 pm - 2:15 pm	**General Session |** The Secret Sauce in Your Content Barbecue	*Gotham Ballroom*
2:15 pm - 3:15 pm	**Concurrent Breakout Sessions |** *Choose from the following:*	
	Collaboration: Beyond the Inbox	*Gramercy Park*
	LinkedIn and Google Adwords – Practical Tips	*Union Square Park*
	Taking Advantage of Asset Flow Data and Screening Activity Trends to Better Populate Databases, RFPs, and Marketing Materials	*Bryant Park*
	The Intersection of PR and Asset Management	*Madison Square Park*
	TRANSFORMing the Marketing/IT Relationship	*Riverside Park*
	Video Production: Soup to Nuts	*Hudson River Park*
3:15 pm - 3:30 pm	**Closing Remarks – and Announcement of PAICR ACE Winners!**	*Gotham Ballroom*

ProFusion

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Want better visibility in consultant databases?

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Keynote Speakers

Ann Handley

Author, Chief Content Officer
MarketingProfs

Ann Handley is a *Wall Street Journal* best-selling author, keynote speaker, and the world's first Chief Content Officer.

Ann speaks and writes about how you can rethink the way your business markets. Cited in *Forbes* as the most influential woman in Social Media and recognized by *ForbesWoman* as one of the top 20 women bloggers, Ann Handley is the Chief Content Officer of MarketingProfs, a training and education company with the largest community of marketers in its category.

She is a monthly columnist for *Entrepreneur* magazine, a member of the LinkedIn Influencer program, and the co-author of the best-selling book on content marketing, *Content Rules: How to Create Killer Blogs, Podcasts, Videos, Ebooks, Webinars (and More) That Engage Customers and Ignite Your Business* (Wiley 2011). The book has been translated into nine languages, including Turkish, Chinese, Japanese, Korean, Italian, Portuguese. Her most recent book, *Everybody Writes: Your Go-To Guide to Creating Ridiculously Good Content* (Wiley, 2014) is a *Wall Street Journal* bestseller.

She currently has more than 260,000 followers on Twitter and writes about content, marketing and life at the highly entertaining AnnHandley.com.

A pioneer in digital marketing, Ann is the co-founder of ClickZ.com, which was one of the first sources of interactive marketing news and commentary. She started her career as a business journalist and editor.

Ann is based in Boston, Massachusetts.

Michael Rogers

Author

Michael Rogers is a best-selling author, technology pioneer and futurist, who most recently served as futurist-in-residence for *The New York Times*. He has worked with companies ranging from FedEx, Boeing and NBC Universal to Microsoft, Pfizer and Siemens, focusing on how companies can think about the future in useful ways. He speaks to audiences worldwide and is a regular guest on radio and television.

Rogers began his career as a writer for *Rolling Stone* magazine. He co-founded *Outside* magazine and then launched *Newsweek's* technology column, winning numerous journalism awards. For ten years he was vice president of The Washington Post Company's new media division, leading both the newspaper and *Newsweek* into the new century and earning patents for multimedia technology. He is also a best-selling novelist whose books have been published worldwide, chosen for the Book-of-the-Month club and optioned for film.

Rogers earned degrees in physics and creative writing at Stanford University, with additional studies in finance and management at the Stanford Business School Executive Program. He lives in New York City and is currently working on book and television projects.

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Schedule of Events

Day 1: Monday, November 16, 2015

7:30 am - 9:00 am	**Registration and Breakfast**	*Central Park/Gotham Foyer*
9:00 am - 9:30 am	**Welcome and Opening Remarks**	*Gotham Ballroom*
9:30 am - 10:45 am	**General Session**	*Gotham Ballroom*

Digital

The (Virtual) Future of Financial Services

We've already seen a remarkable amount of how we work, learn, shop – even meet our mates – move into the virtual world. The shift has already affected financial services in many ways, but much more is to come. An increasing amount of financial marketing, education and consumer decision-making is done entirely online. Managed peer-to-peer networks challenge incumbents in sectors ranging from consumer loans and currency exchange to car insurance. Cognitive computing offers low-cost automated financial planning with the potential for better performance than humans. Finally, our next generation of employees and customers is already growing up with one foot firmly in the virtual world. The winners for the rest of this decade will be those who best balance what is done virtually with what should remain in the real world.

Speaker:

Michael Rogers, Author, technology pioneer and futurist

10:45 am - 11:30 am	**Networking Break and Meet the Exhibitors**	*Central Park/Gotham Foyer*
11:30 am - 12:30 pm	**Concurrent Breakout Sessions** | *Choose from the following:*	

Management/ Leadership

Best Practices for Partnering with Compliance — *Riverside Park*

Marketing and compliance go hand-in-hand when bringing a project across the finish line, but often times opinions will differ regarding what the final product should look like. It takes work to understand where each side is coming from. This workshop will discuss best practices to help marketing and compliance connect to create a successful partnership.

Speakers:

Kari Brett, Senior Marketing Manager, Principal Global Investors
Georgia Cochrane, Compliance Manager, Invesco
Gordon Kerper, CCO, Allianz Global Investors Distributors

MarCom/Digital

How a Global Asset Manager is Adapting to Create a World-Class Client Experience — *Gramercy Park*

Today's connected and mobile clients expect more than a sales pitch. They want personalized interactions and relevant information in a timely manner. Investment management firms who recognize and quickly adapt to this new trend have positioned themselves to deliver a better client experience and are rapidly setting themselves apart from their competitors. This presentation will provide attendees with insight into how Putnam Investments is currently using new marketing strategies and technologies to gain a competitive advantage in the marketplace. Session attendees will learn how marketers at Putnam Investments are using the latest technologies and trends in mobile, social, and database marketing.

Speaker:

Mark McKenna, Head of Global Marketing, Putnam Investments

MarCom	**Marketing Metrics: Meaningful Measurements for your Business**	*Madison Square Park*
	How effective was your recent email campaign? Which component of your last advertising initiative gave you the best bang for your buck? What kind of traffic did the landing page for your new product generate in its first week? These are just a few examples of the kind of questions we are regularly asked and expected to answer. But can you – and to what level of detail? Hear from an industry CMO with a firm belief in the value of marketing metrics. Join us to discuss why you don't have to spend a fortune to be able to generate meaningful data about your business. **Speaker:** **Maureen Bromwell**, Chief Marketing Officer, Asset Management, Northern Trust	
RFP	**Structuring an RFP Team for Efficiency**	*Hudson River Park*
	With evolving industry dynamics, there is no longer a single model that can ensure an efficient RFP team for each company's needs. Whether you're part of a single vs. solo team, work remotely or with outsourced resources, this session will give you an opportunity to discuss the best configuration of your team given your company's demands. **Speaker:** **Lisa Williams**, RFP Manager, North America, Allianz Global Investors	
MarCom	**The Evolution of Portfolio Commentary**	*Bryant Park*
	We all know that portfolio commentary is high on the list of what our clients want – and they want it as soon as possible! Juggling the resources internally each quarter to produce this valuable collateral can be a headache for those involved. But new ideas to help streamline this process are on the rise. Hear from two firms as they share how they have automatically turned portfolio data into commentary. Learn about streamlining the process for producing this key marketing and client service content. **Speakers:** **Omri Ben-Amos**, VP Marketing at ClearBridge Investments **Amit Patel**, Director of Account Management, Narrative Science	
Digital (Roundtable)	**Website Content Management Systems**	*Union Square Park*
	Content Management Systems (CMS) – that allow non-technical team members, without web-design or code expertise, to log into a website and make changes – are gaining in popularity because of their flexibility, cost savings and ease of use. Not all CMS solutions, however, are created equal, so this session aims to uncover which solutions are working best for PAICR members. Are you in charge of making changes to your company website? Are you looking for ways to improve upon workflow and make content changes quickly yourself? Are you struggling with limitations in any of these areas? Join this roundtable and discuss your experiences and challenges with your peers and learn best practices and suggestions on how to get the most out of your CMS. **Facilitator:** **Tony Lazzari**, Product Specialist/Relationship Manager, Bull Marketing Inc.	
12:30 pm - 1:45 pm	**Networking Lunch**	*Central Park/Gotham Foyer*

1:45 pm - 3:00 pm	**General Session**	*Gotham Ballroom*
Digital	**Is it Finally Time for Social?** It's fair to say that the asset management industry has been slower than most to embrace social media – but the wheels are now turning. In this general session you will hear from Greenwich Associates on the social media channels institutional investors favor, and from the social media leads at selected investment management firms regarding their social media best practices and experiences. **Speakers:** **Ryan Bolton**, Head of Digital Marketing, Allianz Global Investors **Dan Connell**, Managing Director, Greenwich Associates **Kristen Swenson**, Director of Communications & Marketing, Royce & Associates	
3:00 pm - 3:45 pm	**Networking Break and Meet the Exhibitors**	*Central Park/Gotham Foyer*

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3:45 pm - 4:45 pm	**Concurrent Breakout Sessions** | *Choose from the following:*	
Professional Development (Roundtable)	**Best Practices for Jack-of-all-Trades Marketing Heads**	*Union Square Park*
	From presentations to RFPs to digital media and everything in-between, small marketing team members do it all! How do you manage time and utilize resources to make getting things done easy and efficient? Join this roundtable to share and learn practical tips on how to most effectively meet multiple marketing and communications demands. **Facilitator:** **Shannon Burnett**, Director of Client Communications, River Road Asset Management	
Digital	**Building a Full Funnel Content Strategy: Connecting Customer Touchpoints to Win More Decisions**	*Bryant Park*
	There are many critical decision points in the prospect lifecycle - and often the difference between winning or losing business depends on how successfully marketers deliver the right message or content at each of these pivotal moments. Your story needs to be visible, different, and compelling. Your content needs to be multi-channel and multi-screen. Your message needs to be targeted, personalized, and relevant. And, you need the analytics to prove that all of it worked. In this workshop, experts from ThinkAdvisor.com and ALM's Marketing Solutions team will share best practices for building a full funnel strategy and will review recent research that links advertising, content, and other tactics to critical customer decision outcomes. **Speakers:** **Adam Dunn**, ALM Media/ThinkAdvisor **Jamie Green**, ALM Media **Josh Heitsenrether**, ALM Media	
RFP/ Management/ Leadership	**How to Drive Visibility and Alignment of Resources within your Organization to Achieve Proposal Excellence**	*Riverside Park*
	Responding to RFPs and generating proposals is a time consuming and often under-appreciated function within any B2B organization. Yet it's a critical component to winning new business. In this session, Lord Abbett (a Proposal Software client) will share their views on how executive sponsorship within their organization has helped to establish the goal of improving productivity and the quality of output throughout the proposal process as a high priority. This sponsorship helped drive the visibility and alignment of resources necessary to successfully transition their existing proposal process, implement a new proposal system and train staff members within less than 45 days. Learn how you can bring this same approach to your company to drive greater productivity and generate more business. **Speakers:** **Jean Boyle**, VP, Northeast Regional Manager, Proposal Software **Steven L. Raimer**, Partner, Market Strategist, Lord Abbett **Olenna Tysiak**, Director, Product Strategy, Lord Abbett	
RFP	**Trends in RFP Search Activity**	*Gramercy Park*
	It's a competitive market. What are the trends we are seeing in manager selection? Join us for a discussion on what is going on in the industry today and what can lead your firm to greater success. **Speaker:** **Pamela DeBolt**, Cerulli Associates	

Retail	**What we Uncovered About the RIA Channel – and Actions You Can Take Today to Grow Your RIA Business**	*Madison Square Park*
	If RIAs are an important audience for your firm (and you've found them to be a somewhat mysterious and elusive group), this session will shed some much needed light. Attendees will learn what research has uncovered about RIAs attitudes towards asset manager marketing and sales efforts and specifically the preferences of active and passive RIAs. The information is highly actionable and can be leveraged into a more effective marketing plan for this important channel. **Speaker:** **James Lesser**, Principal, SwanDog Strategic Marketing	
4:45 pm - 5:00 pm	**Closing Remarks**	*Gotham Ballroom*
5:00 pm - 6:30 pm	**Networking Reception**	*Central Park/Gotham Foyer*

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7:00 PM	**Dinner Mixer (optional)**	*Meet at registration desk*

Following the cocktail reception, PAICR members will have an opportunity to network with other members over dinner at one of Manhattan's many fine eating establishments. There are several restaurants from which to choose that feature an array of tasty cuisines. Although this is not a conference-sponsored activity, PAICR has secured reservations for small groups at a handful of local restaurants. A conference favorite, this event provides a great opportunity to meet new colleagues and catch up with old friends. Stop by the registration desk for more information on the restaurants and how to sign up.

Day 2: Tuesday, November 17, 2015

8:00 am - 9:00 am	**Registration and Breakfast**	*Central Park/Gotham Foyer*
9:00 am - 9:15 am	**Welcome and Opening Remarks**	*Gotham Ballroom*
9:15 am -10:30 am	**General Session**	*Gotham Ballroom*

Strategic Marketing

Life in the Middle: CMO Panel

This year's CMO panel explores the role marketing has in an organization as a veritable nexus connecting sales, the investment professionals, operations and more. Our panelists will share their views on the opportunities and challenges presented by this unique position.

Moderator:

Henry F. Detering, CFA, Managing Director, Global Marketing, Lazard Asset Management

Panelists:

Carmela Di Meo, SVP, Head of Marketing – Americas, PineBridge Investments

Todd Glickson, SVP, Director of Global Marketing and Product Solutions, Cohen & Steers

Christopher J. Reddy, Executive Director, Strategic Marketing, Product and Business Development, Principal Global Investors

10:30 am -11:15 am	**Networking Break and Meet the Exhibitors**	*Central Park/Gotham Foyer*
11:15 am - 12:15 pm	**Concurrent Breakout Sessions** | *Choose from the following:*	

MarCom

How to Grow your Edge with Institutional Investors — *Gramercy Park*

Every PAICR member knows that great investment performance by itself is not enough to attract and retain substantial institutional investor assets. Amanda Tepper, CEO of Chestnut Advisory Group will share her firm's research identifying and describing the key factors driving institutional investors' decision to hire and retain an asset manager. These key factors all center around outstanding investor education, so in this session Ms. Tepper will share suggestions about how you can tell a high ROI story to your firm's current and prospective investors.

Speaker:

Amanda Tepper, CEO, Chestnut Advisory Group

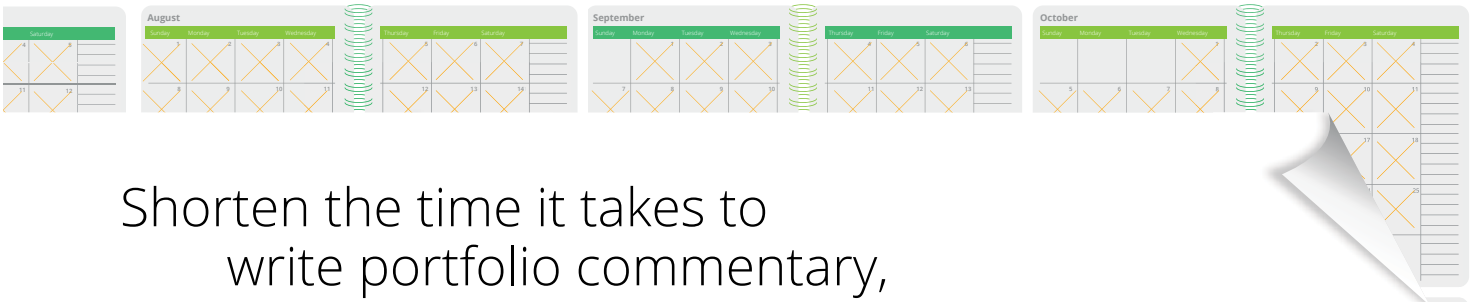
Consultant Databases

Polishing your Consultant Database Profiles for Maximum Visibility *Hudson River Park*

This workshop will focus on how investment managers can conduct effective reviews and refreshes of their consultant database profiles. With the landscape so competitive, investment managers need to shift their focus from just getting data into databases to polishing their profiles in databases. Ongoing reviews and maintenance of database profiles are essential to enhance a manager's chances of being seen and screened into searches. So how can an investment manager perform an effective and efficient review when resources and time can be limited? We'll explore this question and others during this interactive session.

Speaker:

Rick Gagnon, President, Compass iTech, LLC/ProFusion



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Narrative Science works with leading firms, including **American Century Investments** and **Nuveen Investments**, to automatically transform portfolio data into written commentary that is insightful and reflects a firm's communication practices.

+**Deliver high-quality** and consistent commentary to prospects and clients
+**Accelerate the process** of creating marketing material and investment communications
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narrativescience.com/PAICR
to sign up for a free 30-day trial of Quill Portfolio Commentary.

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NarrativeScience

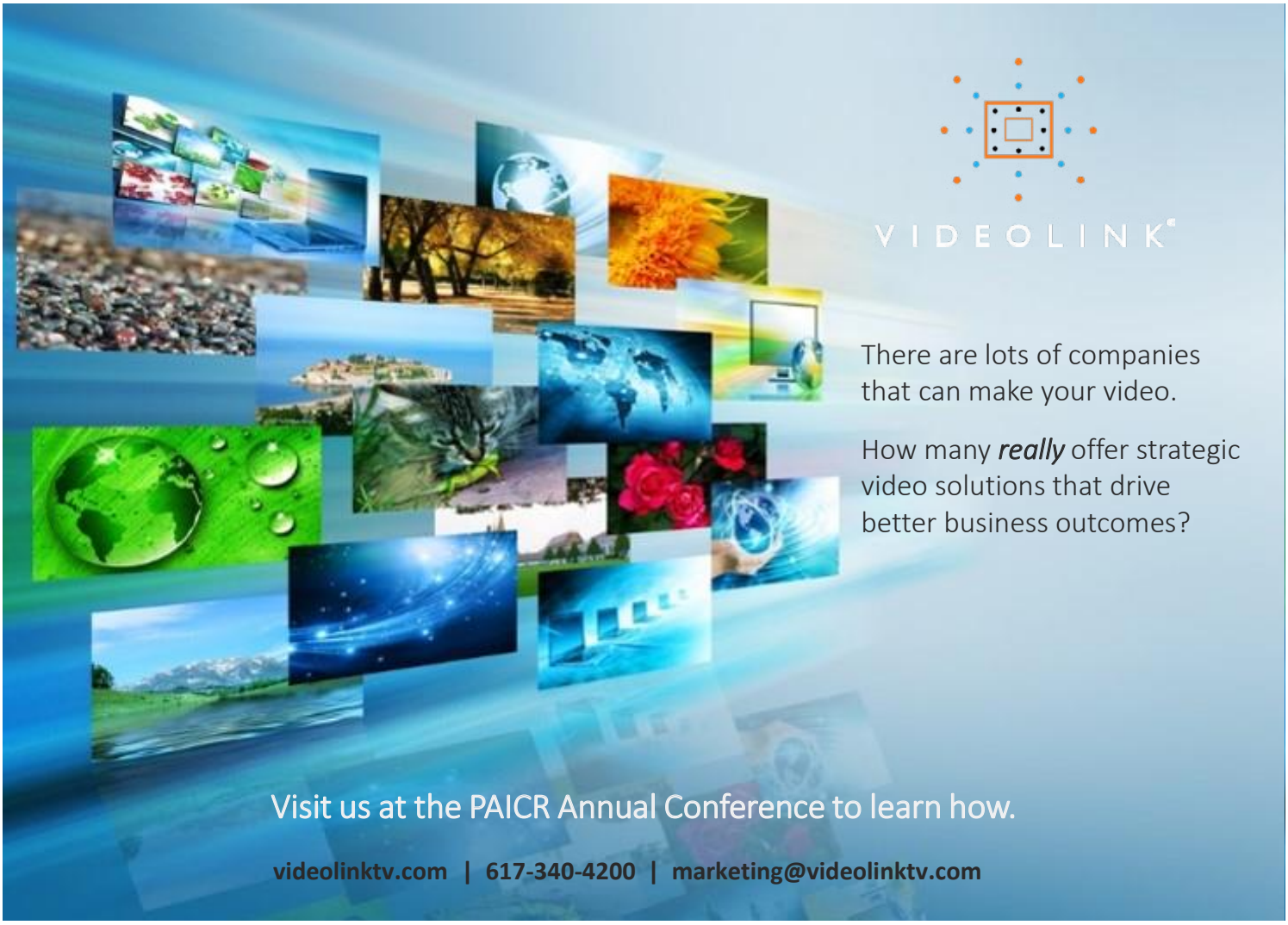
MarCom	**Results of the PAICR/P&I Content Marketing Study**	*Riverside Park*
	In June of this year, PAICR partnered with Pensions & Investments to conduct a survey on the prevalence and importance of content marketing in the financial services industry. The objective of the survey was to benchmark how the financial services industry compares to other B2B industries when it comes to implementing content marketing strategy and tactics. The results of the survey are now available and will be presented and discussed during this workshop. **Speakers:** **Elayne Glick**, Director of Audience Development, Pensions & Investments **Julie Parten**, Account Manager, Pensions & Investments	
Retail and Institutional	**Retail vs. Institutional: What's the Difference Anymore?**	*Bryant Park*
	The blurring of lines is also evident in the retail and institutional investment markets. We regularly hear talk of the institutionalization of retail and equally the retailization of institutional. In that context, does it really make sense any more to draw a clear distinction between the two investor audiences? And if not, what implications might that have for how firms structure their marketing and sales teams? This discussion will allow participants to share market insights and practices they are developing to deal with the blurring of the retail/institutional line (if it still actually exists!). **Moderator:** **Anne Banks**, Principal, gr8 communications LLC **Speakers:** **Joanna Irwin**, Head of US Marketing, Invesco Distributors, Inc. **Sue King**, US Chief Marketing Officer, Allianz Global Investors	
MarCom	**Successful Rebranding: it's all in the Detail**	*Madison Square Park*
	A rebrand is one of the most important strategic initiatives a firm will undertake. It's a hugely creative process AND when executed properly unifies a company's culture and clarifies its position to the marketplace. Implementation requires nothing short of military precision – especially when the firm is large and has a global footprint. Regardless of size, however, there are some core principles that all rebrands should embrace to secure success. The Global Brand Director at AB (previously known as AllianceBernstein) will share with us key takeaways from their recent rebranding process and experience, which we expect will prove insightful for member firms in the midst of or about to embark on a rebrand. **Speaker:** **Bill Hays**, Global Brand Director, AB	
Professional Development (Roundtable)	**We've Been Acquired!**	*Union Square Park*
	These are words that most employees would prefer not to hear—but it's becoming an increasing reality in the investment industry. Change like this can create a variety of challenges—both professional and personal. If you've been through this kind of corporate change…are just embarking on the journey…or suspect it could be in the pipeline for your firm, come and share your experiences and insights or seek advice and guidance from fellow PAICR members. **Facilitator:** **Gail Prins-Visser**, Communications Manager, Connor, Clark & Lunn Financial Group	
12:15 pm - 1:15 pm	**Networking Lunch**	*Central Park/Gotham Foyer*

1:15 pm - 2:15 pm	**General Session**	*Gotham Ballroom*
MarCom/Digital	**The Secret Sauce in Your Content Barbecue** You don't need more content; you need better content. But what does "better" content mean? How can you get some of that? And how can your content attract the people you want to attract? In this session, Ann Handley (author, *Everybody Writes: Your Go-To Guide to Creating Ridiculously Good Content*) gives you the keys to better content. You'll discover how to develop a unique tone of voice and create the kind of content that makes people rely on and trust you. **Speaker:** **Ann Handley**, Author and Chief Content Officer, MarketingProfs	
2:15 pm - 3:15 pm	**Concurrent Breakout Sessions** | *Choose from the following:*	
Professional Development	**Collaboration: Beyond the Inbox**	*Gramercy Park*
	Projects we work on are increasing in scope and complexity, while the business days to complete them are decreasing. E-mail is no longer up to the task. Figuring out what needs to get done, prioritizing responsibilities, and finding the information you need from a crowded inbox is inefficient. Collaboration tools have risen up to help make us more effective in working together. Learn about several of the top tools available that can help make teamwork easier and more efficient. **Speaker:** **Deb Well**, Director of E-Business, Harbor Capital Advisors, Inc	

SHAPING AN INVESTMENT INDUSTRY THAT SERVES THE GREATER GOOD

Digital (Roundtable)	**LinkedIn and Google Adwords – Practical Tips**	*Union Square Park*
	Advertising on LinkedIn or with Google Adwords is very different than traditional digital advertising. Are you targeting the right audience? Do you have the best long-tail keywords? Is your bid too low? Or too high? Join this roundtable to learn practical tips and best practices for spending your ad dollars effectively in these channels and get the most out of your marketing campaigns. **Facilitators:** **Daniella Boni**, Marketing Director, Callan Capital **Tom Mulligan**, Director, Product Management and RFP, Brandes Investment Partners, LP	
RFP/MarCom	**Taking Advantage of Asset Flow Data and Screening Activity Trends to Better Populate Databases, RFPs, and Marketing Materials**	*Bryant Park*
	Last year, institutional investors and their consultants researched over 1.5 billion data points through eVestment. At any given point in time, eVestment screening activity data shows where institutional investors and consultants are focusing their attention. What they're searching for, what they're reporting on, and what they're looking at in the hundreds of thousands of comparison charts they create every year. In this session, we'll share our insight into the latest asset flow trends, what's getting consultant and investor attention, and how you can leverage that knowledge to better position your strategies for success. **Speakers:** **Andrew Bevan, CFA**, Solutions Specialist, eVestment **Melanie Horvath**, Senior Vice President, eVestment	
MarCom	**The Intersection of PR and Asset Management**	*Madison Square Park*
	Maybe your portfolio managers think CNBC is just financial drivel. Or maybe the CIO is constantly complaining that they should be on Bloomberg Radio telling those 'bozos' what's really going on in the markets. Or maybe you've heard that you need to be a thought leader and are at a loss for how to do it. Anyway you cut it, PR is essential to building your brand and raising assets. Learn how to build a PR department on a shoestring budget and develop a media strategy that will help your firm grow without spending a fortune on advertising. **Speaker:** **Tucker Slosburg**, Communications Coordinator, Smead Capital Management	
Management/ Leadership	**TRANSFORMing the Marketing/IT Relationship**	*Riverside Park*
	With the growing importance of digital marketing, never has it been more critical for marketing and IT to have a strong partnership. Our panelists will talk about what has made for a successful partnership within their firm, and we'll hear from someone who has worked both sides of the fence—migrating from IT to a digital marketing role. We are hoping you will come and share your firm's marketing/IT philosophy and successes. **Moderator:** **Anne Farro**, Head of Business Management - Institutional North America, Allianz Global Investors **Speakers:** **Henry F. Detering, CFA**, Managing Director, Global Marketing, Lazard Asset Management **Ray Lewis**, Global Marketing Communications Manager, Brandes Investment Partners, LP **Chrystal Williams**, Head of Digital Marketing, Invesco	

Digital	**Video Production: Soup to Nuts**	*Hudson River Park*
	Video drives engagement, awareness and, when done right, video drives revenues. Have you taken the plunge yet into incorporating video into your marketing strategy? Not sure where to start? Or not sure your video production and distribution is as effective as it could be? Join Marianne Rocco from Videolink and Deb Wetherbee from Asset.TV to learn all you need to know about best practices in creation, compliance and content marketing to get the most from your firm's video assets. **Speakers:** **Marianne Rocco**, Director of Marketing, VideoLink **Deb Wetherbee**, Business Development, Asset.TV	
3:15 pm - 3:30 pm	**Closing Remarks – and Announcement of PAICR ACE Winners!**	*Gotham Ballroom*



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TOP TEN Things to Know About Your Competitors' RFPs

How Do You Measure Up?

10	Firms say that Content Management is rising skillset/function	100%
9	Response opportunities are vetted by sales	90%
8	RFP teams handle Consultant Databases too	80%
7	Firms use an automated content management software	75%
6	Larger firms base no bid decisions on minimum qualifications	61%
5	Firms have RFP content reviewed by Compliance outside of bid activity	50%
4	Firms typically turn RFPs in 5-10 days	42%
3	Firms have established minimum turnaround times	30%
2	Firms do not track RFP success	25%
1	10-20 Consultant Databases are populated by each firm	

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