



DI DEEP DIVE

JUNE 4 • PHILADELPHIA • HOSTED BY MACQUARIE

Be sure to participate in the growing DI Community as members take a deep dive into key issues that impact data leaders exploring staffing and outsourcing, to leveraging analytics for marketing and more. We've built-in opportunities for open discussion and networking with peers including a meet and greet the night before.

An open roundtable ends a day of presentation providing an opportunity to discuss additional topics.

MONDAY, JUNE 3

5:30 —
7:00 PM

Cocktail Reception

Butcher Bar | 2034 Chestnut St, Philadelphia, PA 19103

TUESDAY, JUNE 4

8:30 AM | Registration

9:00 AM | **Welcome**

Ken Burd, Head of Distribution Intelligence & Sales Enablement — Macquarie Investment Management

9:15 AM | **When to Hire, Outsource or Engage Consultants**

Ken Burd, Head of Distribution Intelligence & Sales Enablement — Macquarie Investment Management

When do you need to bring in a data scientist? What progress do you need to make before it makes sense? Are there other roles or skill sets that are more important? Who owns the role – IT or the data teams? This session will examine experiences, knowledge gained, and questions which still remain.

10:00 AM | Break

10:15 AM | **Choosing the Right Vendor**

Michael Mendelowitz, Director, Client Strategies & Analytics — Franklin Templeton Investments

How do you choose an appropriate vendor, and how do systems play into the decision? Finding the right data vendors and utilizing the appropriate systems based on the data you are buying are important dimensions of creating a successful data distribution framework.

11:00 AM | **Using Analytics in the Sales & Marketing Process**

John Pumphrey, Vice President & Director of Distribution Analytics — Eaton Vance Distributors

What are you using to measure the success and failure of analytics? This session will discuss incorporating analytics into the sales and marketing process, and showing the benefits of the data and how it is being used.

11:45 AM | Lunch & Networking

12:30 PM | Roundtable Discussion

3:00 PM | Adjourn