EI3

EVESTMENT INSTITUTIONAL INVESTMENT INTELLIGENCE CONFERENCE 2019

AGENDA

Monday, March 18, 2019

03:00 – 05:00PM **Registration Open**

03:30 – 05:00PM **Learning Lab - eVestment Essentials**

In this hands-on learning experience, attendees will answer real-world research questions using eVestment data. This workshop is designed for users who are new to the eVestment platform and for those who would like an eVestment refresher.

The session instructor will lead attendees through some of the most common research tasks users conduct in the eVestment platform, and floating experts will be on hand to coach individual attendees.

If you're an intermediate or advanced eVestment user, we recommend other learning options:

- For highly specific training needs, schedule a one-on-one appointment
- If you're an experienced user but would like tips on some advanced features of eVestment, stop by the Circuit Training room for a "learning burst"

05:30 – 07:30 PM **Welcome Reception**

Join us for our Welcome Reception at a must-see Atlanta location. Serving as a cornerstone of northern Atlanta's newest mixed-used community, Omni Hotel at The Battery Atlanta is within steps of SunTrust Park, home of Atlanta's professional baseball team, as well as premier office space, Coca-Cola Roxy music venue and a variety of shopping and dining.

Tuesday, March 19, 2019

07:00 – 05:00PM **Registration Open**

08:00 – 09:00AM **Networking Breakfast**

08:00 – 05:00PM **Circuit Training**

Experienced users will welcome this opportunity for quick "learning bursts" that showcase some of eVestment's most powerful advanced features.

The Circuit Training room is just like a gym. It includes multiple learning stations, each staffed by an eVestment expert ready to show you how to take advantage of a specific research capability in less than 10 minutes. Stop by for as many learning bursts as you like – Circuit Training is open throughout the conference.

If you're an advanced user with a more specific learning need, we recommend scheduling a one-on-one appointment.

08:00 – 05:00PM **One-on-One Appointments**

One-on-one appointments are designed for advanced eVestment users with unique training needs or research questions. Appointments last up to 20 minutes and are staffed by our most experienced eVestment experts.

If you're an experienced user who would just like to learn more about some of the most powerful features of eVestment, we recommend stopping by the Circuit Training room.

09:00 - 09:15AM **Welcome**

09:15 - 10:00AM **Opening Keynote: Positioning Your Firm and Your Products**
Laura Ries, Principal, Ries & Ries Consulting

Traditionally, marketing institutional investment products has highlighted firm history, the credentials and experience of the portfolio team, and headline performance numbers. But today, investors and consultants want more. They want to understand the uniqueness of the portfolio team's thinking and how (or whether) a particular product is unique in comparison to look-alike strategies. Investors and consultants also want to understand more about management firms, not just their stability but also their governance and values.

In this session, positioning expert Laura Ries will explain the art and science of positioning and principles you can use to develop truly differentiating stories about your firm and your products. Her firm Ries & Ries literally wrote the book on positioning, with the #1 marketing book of all time according to Advertising Age. She consults with B2C and B2B firms across the globe on marketing strategy.

10:15 - 11:30AM **Breakout 1: Marketing Research: Understanding Investor and Consultant Perceptions**

In the retail space, Marketers allocate considerable resources to understanding market perceptions: What is top of mind for investors? What factors do investors use to compare similar strategies? What is the performance time-horizon that matters most to investors? How are our products described or rated by third-parties?

In this session, we'll discuss how these same research questions play out in the institutional arena and why understanding investor and consultant perceptions is a pre-condition for an effective, data-driven marketing strategy.

10:15 - 11:30AM **Breakout 1: Pitching Your Thought Leadership to Consultants**
Meredith Jones, Partner, Emerging and Diverse Managers, Responsible Investments, Aon

Every Consultant Relations professional is focused on forging new and deeper relationships with consultants, but the best approach isn't always obvious.

In this session, 20-year industry veteran and AON partner Meredith Jones will share her observations on how to leverage your firm's intellectual capital for nurturing consultant relationships. Fresh, well researched thinking on timely topics is important, but the subject must also be highly relevant to the practical concerns of the consultant's clients: end investors. You'll leave this session with a clearer understanding of the thought leadership that interests consultants and how not to undermine your efforts to connect by pitching the wrong content.

10:15 - 11:30AM **Breakout 1: RFP/Database Networking**

This networking event is designed for attendees who work in the RFP/Database function within their firm. It's a dedicated opportunity to meet peers at other asset managers and share best practices around database marketing.

11:30 - 12:00PM **Networking Break**

12:00 - 12:30PM **Keynote: Navigating Digital Transformation**
Adena Friedman, CEO of Nasdaq

In the words of the Boston Consulting Group (BCG), asset management is in the midst of a "metamorphosis" necessitated by pressure on margins, shifts in investor product preferences, the growth of regional markets and, above all, by a data and analytics revolution.

According to BCG, virtually every large manager is undertaking what they call a digital transformation, hiring data scientists and testing the use of alternative data. At the same time, though, they're struggling with how to operationalize a focus on data to drive decisions at every level of their firms.

In this keynote conversation, Nasdaq President and CEO Adena Friedman will draw on her own experiences to discuss how individual leaders can better navigate digital transformation at their firms.

eVestment's Head of Product, Suzanne Ward, will lead the conversation.

12:30 - 02:00PM **Lunch and Network**

02:00 - 03:15PM **Breakout 2: Database Marketing: A Strategic Advantage**
Amanda Tepper, Founder & CEO, Chestnut Advisory Group

According to the Chestnut Advisory Group, a full 96% of consultants say they use databases when searching for an investor mandate. As a result, most asset managers are aware of how important it is to establish and maintain a market presence through databases. Where they struggle, however, is knowing which data to prioritize and how to tell a clear and consistent story through their database marketing.

In this session, Amanda Tepper, Founder and CEO of Chestnut Advisory Group, will explain how to develop and execute a database marketing strategy that drives measurable results. She'll also discuss how to evaluate the effectiveness of your database effort.

Prior to founding Chestnut, Amanda led product specialists at AllianceBernstein, overseeing the marketing of AB's institutional products. She's regularly sought as an expert commentator on marketing strategy by the industry media, from Bloomberg and Forbes to Fundfire and P&I, and she serves on the 100 Women in Finance Global Advisory Council.

02:00 - 03:15PM **Breakout 2: Alternative Data Sources and Aggregated Intelligence**
Sarah Hullender, Product Manager, eVestment
Buddy Rush, Senior Manager, Client Success, eVestment

Most mature distribution functions already rely on flows data, measurements of investor and consultant screening activity and peer comparison metrics in their planning process. These data sources help managers identify where demand for products is shifting, so they can adjust their sales and marketing strategies accordingly. But even these managers may not be aware of alternative data sources that can take targeted prospecting and competitive positioning to a new level of sophistication. Alternative data can, for instance, provide line of sight into mandates before they're announced, consultants' recommendations and how competitors are pitching their products.

In this session, Sarah Hullender and Buddy Rush – both veterans from asset management -- will explain how to use alternative data and aggregated intelligence to fine-tune your distribution strategy. Sarah is an eVestment strategist for the asset manager segment, and Buddy is a Client Success Manager serving asset manager clients across the US.

03:15 - 03:45PM **Networking Break**

03:45 - 05:00PM **Social Hour with Select Emerging Managers**

Increasing numbers of institutional investors are instituting emerging manager programs and setting D&I criteria for manager searches. At the same time, consultants are interested in identifying new investment talents and capabilities; in fact, some have even established quotas for meeting new and niche managers. eVestment has dedicated this EI3 session to help facilitate your outreach with emerging managers, providing space, refreshments and a select manager roster. Prior to the conference, we'll be reaching out to understand how your firm defines the emerging manager profile, so the select managers invited to this social hour align with your interests. You'll also receive a list of attending emerging managers before the session.

03:45 - 05:00PM **Trends Briefing: What the Data Shows**
John Molesphini, Global Head of Insights, eVestment

Each year, the Trends Briefing is a hallmark of EI3, and one of the reasons leaders in distribution return year after year. You want to understand how institutional assets are moving world-wide; see what the leading indicators say about how investor demand is changing; and assess how well your line-up of investment capabilities will be able to meet emerging investor demands. In this session, eVestment's Global Head of Insights, John Molesphini, will present what the data shows about these and other trends in the institutional market.

03:45 - 05:00PM **Learning Lab: Market Lens**

06:00 - 09:00PM **Taste of Atlanta Dinner and Social Event**

You know Atlanta as one of the country's largest metro areas and home of the world's busiest airport, but did you know it's also a foodie and craft-beer paradise? This casual evening event will showcase Atlanta's modern take on traditional southern fare, along with flights of local brews. You'll also enjoy live entertainment provided by a line-up of Atlanta musicians.

Wednesday, March 20, 2019

07:30 – 08:30AM **Networking Breakfast**

08:00 – 10:00AM **Registration Open**

08:00 – 12:00PM **Circuit Training**

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08:30 – 09:30AM **Breakout 3: RFP/Database - Best Practices for Representing Your Strategies**
Jill Banszak, Client Success Manager, eVestment

Asset owners and gatekeepers rely on the data you provide through industry databases to screen, compare, evaluate and select managers. The timeliness, completeness and quality of that data makes or breaks your marketing strategy, so it's essential to develop a disciplined approach for presenting your strategies in the best light.

Many managers believe that providing quant data around performance and AUM is the most important aspect of database reporting, but actually asset owners and their gatekeepers place considerable value on qualitative data as well. This is great news for managers, because narratives give you an opportunity to go beyond headline numbers to tell a differentiating story that sets your firm and strategies apart. In this session, eVestment database experts will offer practical guidance on how to present your strategies for greatest impact.

08:30 – 09:30AM **Keynote: The Art of Negotiation**
Chris Voss, CEO, Black Swan Group

Today, more often than not, negotiation is part of every relationship. In this keynote presentation, Chris Voss will explain the art of negotiation and techniques that help companies secure better deals and even solve communication problems. Whether you're negotiating with clients or with internal colleagues, this presentation will give you practical ideas for achieving the outcome you need.

In a 24-year career at the FBI, Chris served as the agency's lead international kidnapping negotiator and used his experiences to develop a negotiation methodology focused on "black swans" – or small bits of information that can have an outsize effect of the outcome of a negotiation.

Today, Chris is the CEO of the Black Swan Group, specializing in negotiation consulting. He's also the author of the best-seller Never Split the Difference: Negotiating as if Your Life Depended on It, and he appears regularly in the media as an expert on the art of negotiation.

09:30 – 10:00AM **Networking Break**

10:00 – 11:00AM **Breakout 4: Measuring Your Market Presence**
Dan Caron, Director of Client Success, eVestment
Shari Cruz, SVP Omni Solutions, eVestment

Every manager, like every business, wants to establish and maintain a strong brand in the marketplace, but many struggle with how to quantify that presence. They're also challenged to identify the sales and marketing tactics that actually enhance their market presence. In this session, you'll learn how to track your market presence over time and monitor how consistently you're in front of the asset owners and consultants looking for managers like you. With this analysis, you can put numbers around the effectiveness of your database marketing effort and demonstrate the contribution your team makes to the firm's overall distribution strategy.

10:00 – 11:00AM **Breakout 4: The Science of Prospecting**
Tate Haymond, Head of Sales, eVestment

The best sales and marketing engagements start long before the initial conversation, with research into potential targets: Who should we approach, and when? The broadcast tactics and rotational prospecting of the past are not only inefficient, they're much less likely to get you in front of the gatekeepers and asset owners you want to see. In this session, you'll learn how to take a more targeted, timely approach to prospecting, using data to identify your best targets and to calibrate your timing. By applying this data-driven approach, you'll be reaching out to consultants and investors when they're most open to hearing about strategies like yours.

11:00 – 12:00PM **Consultant Panel - Main Stage**
Moderator: Jerrod Stoller, CEO of eVestment
Panelist: Nat Kellogg, Director of Manager Search, Marquette Associates
Panelist: Clint Cary, Head of US Delegated Investment Solutions, Willis Towers Watson

Each year at EI3, distribution executives are eager to hear from consultant thought-leaders on the trends that are reshaping the institutional landscape. In this executive conversation, Clint Cary, Head of US Delegated Investment Solutions for Willis Towers Watson, and Nat Kellogg, Director of Manager Search and Managing Partner for Marquette Associates, will share their thoughts on how investor priorities and perspectives are shifting. Jerrod Stoller, CEO of eVestment, will moderate.

Which new institutional investing dynamics should asset managers be on the lookout for in the next few years? During the consultant panel the leaders of the global consultant industry are sharing their thoughts about top of mind topics for managers, including:

- Investor preferences regarding:
    - Products
    - ESG/Diversity & Inclusion
    - Streamlining manager relationships
    - Outsourced CIO

12:00 – 12:05PM **Closing Remarks**

About EI3:
EI3 is one of the institutional investment industry's most important conferences, connecting top investment consulting firms and emerging managers. Join us in Atlanta, GA on March 18-20, 2019.

Host Hotel: Renaissance Atlanta Waverly Hotel
2450 Galleria Parkway Southeast, Atlanta, GA 30339

For more information, contact: Amber Wright, Event Marketing Manager
awright@evestment.com
678-496-3261

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