

Digital Marketing Roundtable

JUNE 12
CHICAGO



8:00 AM

Continental Breakfast

8:30 AM

Welcome & Opening Remarks

John Jackson | Senior Marketing Manager | *William Blair*
Kimber Lintz | Executive Director | *IMEA*

8:45 AM

Introductions

9:15 AM

Keeping the Plates Spinning While the Ground's Shifting: A Mid-2024 Digital Marketing Review

What's new across the full digital marketing mix? This discussion will touch on the latest developments and their implications for those responsible for asset manager websites and content, email and social media marketing. Never has more been expected of digital's contribution to business results. Observations on how marketers are innovating, learning, driving success, measuring and modifying - with a dose of artificial intelligence insights sprinkled throughout - will be shared.

Pat Allen | Executive Vice President, LG Digital | *Lowe Group Financial Communications*

9:45 AM

Website Best Practices

- Tech Stacks
- SEO
- Tracking
- Personalization

Discussion Leader: John Jackson | Senior Marketing Manager | *William Blair*

10:45 AM

Social Media

- Social Selling
- Paid Selling
- Relevant Platforms
- New Opportunities

Discussion Leader: Katie Flynn | Vice President, Client Marketing | *Nuveen*

11:30 AM

Break

11:45 AM

Email Marketing & Box Lunch

- Nurture Email Programs
- Personalization
- Partner Access

Discussion Leader: Scott Dorman | Associate Director | *Artisan Partners*

12:30 PM

Sales Enablement

- Best Practices
- Sales Intelligence Reporting & Analytics
- Tools
- Engagement Processes with Sales

Discussion Leader: Kersten Stannard | Vice President, Head of Customer Experience | *Columbia Threadneedle Investments*

1:30 PM

Open Discussion

2:00 PM

Adjourn