



Data Council Summit

Mar 7-8 | Columbus, OH | Hosted by  Nationwide

Tuesday, March 7th

2:30 pm Registration

3:00 pm **The State of Analytics, Business Intelligence, & Sales Enablement**

Data is more critical than ever to successful investment management firm business strategies. Industry leader SS&C will provide insights on current data trends, opportunities and challenges including:

- Developing a roadmap
- Analytics, business intelligence, & sales enablement goals
- Identifying key data sources
- Implementation and adoption

Diana Blaney, Director, WalletShare Product Management & Client Relations | SS&C Technologies

4:00 pm **Identifying Key Data Sources**

This interactive discussion will explore how firms can identify the correct data to support strategies and goals.

Ken Burd, Managing Director – Digital Enablement & Analytics | Principal Global Investors

Matt Machut, Managing Director, Global Head of Sales Strategy & Enablement | Goldman Sachs Asset Management
With SS&C Technologies

5:30 – 7:00 pm Reception

Moran's Bar & Grill

415 N. Front St.
Columbus, OH 43215

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Wednesday, March 8th

8:00 am Registration & Continental Breakfast

8:30 am **Developing a Roadmap**

Investment management leaders will discuss key components to building a successful Data Roadmap, followed by breakout sessions with more specific conversations on:

- Bringing key data together
- Data management
- Developing analytics (build vs. buy)
- Staffing key roles

Ken Burd, Director, Distribution BI & Analytics | Principal Global Investors

Matt Machut, Managing Director, Global Head of Sales Strategy & Enablement | Goldman Sachs Asset Management
With SS&C Technologies

10:00 am Break

10:30 am **Panel Discussion: Driving Adoption & Commercial Impact**

In this “show & tell” session, learn how firms have found success in the sales adoption process, navigated challenges, and what they would have done differently and why. Panelists will share insights on:

- Implementation & rollout
- Managing campaigns
- Serving up data / insights
- Increased adoption
- Leveraging analytics in CRM / other tools

Moderator: **Lee Kowarski**, Vice President, Head of Distribution Solutions | SS&C Technologies

Panelists: **Jane Conway**, Managing Director, Head of Digital, Data & Enablement—Client & Product Solutions | Apollo
Gabriel Parras, Director, Sales & Marketing Intelligence | Thornburg Investment Management

11:30 am

Nationwide's Data Journey & Strategy

This presentation will introduce Nationwide's marketing data evolution, including an overview of the firm's strategy and the benefits of a modern marketing data hub.

Jamie Byrum, Associate Vice President, Marketing Data, Analytics & Research | Nationwide

Patrick Shepp, Sr. Consultant, Marketing Information Management | Nationwide

12:15 pm

Box Lunch

1:00 pm

From Start to Finish: One Firm's Journey, A Case Study

Jamie Hedrick, Vice President, Head of Global Distribution Intelligence | Franklin Templeton

2:00 pm

Adjourn