

Digital Marketing Roundtable

NOVEMBER 5
COLUMBUS, OHIO

8:00 AM **Registration & Continental Breakfast**

8:30 AM **Welcome & Opening Remarks**
Jo Ann Quinif | President & Chief Client Officer | *Diamond Hill*
Kelcee Allen | Marketing Manager | *IMEA*

8:45 AM **Introductions**

9:15 AM **The Intersection of Segmentation & Advisor Scoring**
Segmentation is not a sales plan or a marketing plan, but a distribution plan. We'll explore the current state of advisor engagement, as well as the scoring and segmentation best practices that help optimize resources across the distribution organization.

- How are distribution leaders thinking about the data-driven advisor scores that facilitate segmentation?
- Where can those scores help bridge sales and marketing?
- What can we track to assess and iterate on success?

Ryan Foreman | Associate Principal, US Distribution Solutions | *Broadridge*

9:45 AM **Executive Roundtable Discussions**
These candid, interactive discussions provide a unique forum for Digital Marketing Leaders to take deep dives into top-of-mind issues in this critical business area.

Multi-Channel Marketing

- Email Marketing
- Segmentation
- Social
- Evaluating Success - How are KPIs Changing

Discussion Leader:

Kersten Stannard | Vice President, Head of Digital Customer Experience, North America | *Columbia Threadneedle Investments*

10:30 AM **Break**



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10:45 AM

Website & Personalization

- Gathering Advisor Feedback
- Subscriptions
- SEO Shift: From discoverability to answerability

Discussion Leader:

Caitlin Baggeroer | Program Marketing Director, U.S. Marketing | *Franklin Templeton*

11:30 AM

Workflow Management

- Tools
- Taxonomy
- Firm Approvals

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12:15 PM

Box Lunch

12:45 PM

Sales Enablement

- Marketing & the Internal Sales Desk
- Tools
- Driving Collaboration Between Teams

Discussion Leader:

Jay Wightman | Senior Vice President, Head of Digital Marketing | *Natixis Investment Managers*

1:30 PM

Open Discussion

A chance for participants to ask targeted questions of their colleagues, brainstorm possible solutions for the day's discussions and pinpoint best practices.

2:00 PM

Adjourn



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