NATIONAL SALES MANAGER SUMMIT

NOVEMBER 11 | NEW YORK

8:00 AM	**Continental Breakfast**
8:30 AM	**Welcome Remarks & Introductions** **David Borelli** | Senior Vice President, National Sales Director | *Invesco* | Host
8:45 AM	**Consultant Perspective** ***Discussion Leader:*** **Mario Favetta** | Relationship Manager | *FUSE Research Network*
9:15 AM	**Field Sales Evolution** Explore how field sales must evolve to meet tomorrow's demands by challenging outdated metrics, practices, and processes that limit efficiency and performance. This session will examine the new strategies, habits, and ways of working needed to drive future success, while identifying what to leave behind to create a more agile, effective, and results-driven sales organization. ***Discussion Leader:*** **Jim Zurad** | Co-Head of US Intermediary Wealth Management – Field Sales | *T. Rowe Price*
10:00 AM	**Break**
10:15 AM	**Next Generation Leadership** Rethink how sales organizations can prepare the next generation of leaders to navigate an evolving business landscape. This session will focus on the skills and capabilities future sales managers need, strategies for effective succession planning, and innovative approaches to leadership training and development. Participants will also discuss how data and analytics can be leveraged to strengthen decision-making, develop talent, and drive sales performance. *Discussion Leader:* **Chase Bower** | Senior Vice President, Head of Sales | *Harbor Capital Advisors, Inc.*
11:00 AM	**Productivity & Capacity** Assess how sales organizations can optimize team structures, resources, and incentives to maximize productivity and capacity. This session will examine hybrid models, pod structures, and alternative approaches to organizing sales teams, while identifying opportunities to improve efficiency and performance. Participants will also discuss how incentive structures can evolve to reinforce desired behaviors, align with business priorities, and drive stronger sales outcomes. ***Discussion Leader:*** **David Chorba** | National Sales Manager | *Nomura*
11:45 AM	**Lunch**
12:15 PM	**AI & The Future of Sales** Envision how artificial intelligence is poised to transform field sales and the role of the National Sales Director. This session will examine AI's potential to enhance productivity, improve sales effectiveness, and strengthen data-driven decision-making. Participants will discuss the greatest opportunities to integrate AI into sales strategies, team management, and daily workflows to drive greater efficiency, performance, and competitive advantage. ***Discussion Leader:*** **David Borelli** | Senior Vice President, National Sales Director | *Invesco*
1:00 PM	**Adjourn**

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