The New Paradigm for

DISTRIBUTION SUCCESS

MMI Virtual Event Series for Distribution Professionals

AGENDA

Monday, April 27, 2020

1:00 PM – 1:45 PM

Tales from the Trenches: How Top Sales Teams Are Managing the Shift to Working Remotely

Almost overnight, distribution teams have had to adjust to the entire team working remotely. For both internal and external wholesalers, it's been a major adjustment on many fronts. To maintain service levels, they've had to quickly master new technologies, shift to proactive engagement strategies virtually, find ways to keep emotionally connected across the team, manage their time effectively, and maintain their energy and motivation. Hear directly from two distribution leaders how they've helped their teams make the shift, how they are balancing the pros and cons, and what advice they would offer to others.

Introduction:
John Moninger, Managing Director, Retail Sales, Eaton Vance

Speakers:
David Gordon, Vice President, Director, Eaton Vance Advisor Institute
Mark Mol, Internal Consultant, Delaware Funds by Macquarie

Monday, May 4, 2020

1:00 PM – 1:45 PM

Success Tips for Virtual Internal Sales Teams

The fact that their internal wholesalers are now working remotely is a challenge for distribution and sales teams that requires both cultural and technological changes. How are firms helping their internals adapt to their new home workspaces and stay connected? Hear firsthand from two Heads of Internal Sales – one who converted his internal team to work remotely before the current Coronavirus crisis and another who has just gone through the process with her team. They will share lessons learned and success tips for managers and internal wholesalers including setting expectations, communications using buddy teams and huddles, leveraging technology and data, time blocking plans, tracking metrics, and staying motivated.

Moderator:
Maureen Wilke, President, Wilke and Associates, Inc. and The Connected Advisor

Speakers:
Ronice Barlow, SVP, Head of US Strategic Planning & Business Development, Head of Internal Sales, Franklin Templeton
Ari Forman, Head of Internal Sales & Sales Strategy, Ascensus

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Thursday, May 14, 2020

1:00 PM – 1:45 PM

Point-Counterpoint: The Lasting Impact of Social Distancing on Investment Product Distribution

Will the COVID-19 pandemic fundamentally change the distribution of investment products? Hear two industry veterans square off in a lively debate on the lasting impact of the current crisis on advisory distribution models. Topics will include potential changes and implications related to the role of the wholesaler, the internal sales function, marketing and advisor engagement, metrics and compensation programs, and sales analytics. If you're a distribution professional, you won't want to miss this session!

Speakers:
Neil Bathon, Managing Partner, FUSE Research Network
Mark Spina, President & COO, FLX Distribution

Monday, May 18, 2020

1:00 PM – 2:00 PM

Sales Team Success in a Changed World: The View from Senior Distribution Leaders

Heads of distribution and national sales managers are guiding their teams through uncharted waters. A panel of senior sales leaders shares perspective on the current environment, what's working and what's not, how they are coordinating sales, marketing and analytics efforts, and developments at distributors. They'll also peer "over the horizon" at how they are forward planning and setting up their teams for future success.

Moderator:
Brett Wright, Head of Client Solutions Group Americas, Macquarie Group

Speakers:
Pat Feigley, Managing Director, Head of US Global Wealth Management Sales, PIMCO
Bob Geppner, Head of National Sales – US, Franklin Templeton
Tom Malone, Partner, Co-Head of Client Services, Lord Abbett

Wednesday, May 27, 2020

1:00 PM – 1:20 PM

Bonus Session: 5 Ways to Help Advisors During "Social Distancing"

Even in the current environment, the laws of sales haven't changed. Advisors will talk to wholesalers if they can offer something of value now – with the emphasis on "now." In a tight 20 minutes, this session highlights five specific tips on how sales professionals can offer value to advisors today. You'll hear actionable advice about how to share the type of information that advisors are hungry for right now – everything from language that calms nervous clients to advice on acquiring new clients and generating referrals.

Speaker:
Brian Margolis, Founder, PGWholesaling.com

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