

**2026 Global Forum – Breakout Session Descriptions (as of 7 May 2026)**

**Monday Morning Sessions**

Track	Breakout Session	Description	Facilitator
Distribution Enablement	<b>The Near-Term Automation Opportunity: What Distribution Can Hand-off to AI Now</b>	Beyond the hype—what can AI realistically automate in distribution today? This session examines near-term use cases such as AI-powered internal wholesalers, meeting prep, follow-ups, and advisor insights, separating immediately deployable solutions from longer-term bets.	Noel
Sales & Marketing	<b>What Sales Teams Actually Want from AI and Technology</b>	Skip the vendor pitch. Hear directly what sales teams are asking for—from CRM enhancements to AI-driven insights—and where current tools fall short. A grounded look at demand signals from the field and how firms are prioritizing development.	Patrick
Business Intelligence	<b>CRM for Distribution: Data Models, Integration, and Best Practices</b>	How should institutional CRM data really be structured? This session explores best practices for CRM design, integration with third-party data sources, and lessons learned from firms that have tackled data unification successfully.	Mario Andy

**Monday Afternoon Sessions**

Track	Breakout Session	Description	Facilitator
Distribution Enablement	<b>Activity Capture in CRM: Getting Sales to Log What Actually Matters</b>	Everyone wants better activity data—few get it. This session tackles the cultural, workflow, and technology barriers to meaningful CRM activity capture, plus practical solutions that are driving adoption without burdening sales teams.	Mario Andy
Sales & Marketing	<b>Improving Client Conversations with Marketing Content</b>	Explore how personalization is being used to surface the <i>right</i> marketing and investment content at the <i>right</i> time to sales teams. A deep dive into how firms are improving sales communications using structured knowledge from tools like Seismic.	Patrick
Business Intelligence	<b>Data Integration Challenges and Solutions</b>	A practical discussion on unifying internal data with third-party data sources. Participants will share best practices, lessons learned, and real-world experiences integrating external datasets to improve data quality, usability, and coverage across distribution and client teams.	Noel

**Tuesday Afternoon Sessions**

<b>Track</b>	<b>Breakout Session</b>	<b>Description</b>	<b>Facilitator</b>
<b>Distribution Enablement</b>	<b>Metrics That Matter: How KPIs Are Evolving</b>	As data becomes embedded in daily workflows, how should success be measured? This session looks at how firms are evolving KPIs to reflect productivity, quality, and impact—rather than just usage.	Andy
<b>Sales &amp; Marketing</b>	<b>Alternatives Distribution in Asset Management</b>	Alternative products bring unique complexity—and many firms are poised to be a major disruptor. This session explores how Sales & Marketing teams are reshaping alt product education, suitability, reporting, and distribution workflows.	Mario
<b>Business Intelligence</b>	<b>Data ROI Reality Check: Why No One Can Prove It (Yet)</b>	Despite heavy investment in data, few firms can confidently demonstrate ROI. This candid discussion explores why data ROI remains elusive, what's broken in current measurement approaches, and what practical steps firms can take to better connect data spend to business outcomes.	Noel