

2026 Fall Forum: Breakout Session Descriptions



Tuesday Morning Sessions

Track	Breakout Session	Description	Facilitator
Data Strategy & Analytics	Data Integration vs. AI – Where to Focus First?	Discussion Format: A facilitated roundtable where participants discuss how their organizations are balancing investments in data integration and AI. The discussion will explore sequencing strategies, implementation challenges, and practical lessons learned to help firms maximize business value.	Noel R. Bill H.
Innovation & Intelligent Automation	Driving Workflow through Automation	Discussion Format: A collaborative discussion focused on automating business processes through AI, intelligent agents, and enterprise productivity tools. Participants will share opportunities, implementation approaches, governance considerations, and lessons learned from deploying AI-powered workflows.	Lindsay N. Gary N.
Sales, Marketing & Client Engagement	Meeting Prep – From Concept to Field Adoption	Discussion Format: A practitioner-led discussion examining how firms have designed, implemented, and successfully adopted meeting preparation solutions. Participants will share lessons learned, implementation challenges, and feedback from sales teams.	Bill F. Colleen N. Katie M.
Transformation & Industry Best Practices	Data Governance Strategies	Discussion Format: A case study discussion where firms share their experiences developing data governance strategies across multiple platforms. Participants will explore implementation approaches, governance models, executive sponsorship, and key lessons learned throughout the transformation journey.	Inder Mario

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Tuesday Afternoon Sessions

Track	Breakout Session	Description	Facilitator
Data Strategy & Analytics	The Evolving Role of Data in Distribution Organizations	Discussion Format: An interactive discussion examining how firms are organizing data teams and embedding analytics into day-to-day business decisions. Participants will compare organizational structures, operating models, and approaches to supporting Sales and Marketing with actionable insights.	Inder Colleen N.
Innovation & Intelligent Automation	AI for Data & Analytics	Discussion Format: A peer discussion examining how organizations are using AI and machine learning to enhance analytics, forecasting, segmentation, and business intelligence. Participants will compare successful implementations and discuss how AI is supporting more informed business decisions.	Lindsay N. Bill H.
Sales, Marketing & Client Engagement	Modern Marketing Enablement & Email Outreach	Discussion Format: An interactive discussion focused on how marketing and enablement teams are supporting sales through personalized campaigns, targeted outreach, and data-driven engagement strategies. Participants will exchange best practices for increasing campaign effectiveness and advisor engagement.	Bill F. Gary N. Katie M.
Transformation & Industry Best Practices	Building a Data Strategy That Actually Gets Funded	Discussion Format: A high-level discussion exploring how organizations build compelling business cases for data and technology investments. Participants will share strategies for securing executive sponsorship, prioritizing initiatives, establishing governance, and aligning data programs with measurable business outcomes.	Noel R. AIVIQ Team

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Data Strategy & Analytics	Structuring Data for AI Success	Discussion Format: A collaborative discussion focused on the foundational data capabilities required for successful AI adoption. Participants will share experiences in improving data quality, governance, and architecture while preparing enterprise data for AI-driven use cases.	Noel R. AIVIQ Team
Innovation & Intelligent Automation	Implementing AI Across the Client Management Lifecycle	Discussion Format: A practical, peer-level working session for the teams responsible for selecting, implementing, and scaling AI tools. Cohen & Steers will share its experience moving from initial approval through adoption and measurement, while participants compare approaches and assess where their firms sit today.	Lindsay N. Gary N. Jump Team
Sales, Marketing & Client Engagement	Client Onboarding – Removing Bottlenecks in Institutional Workflows	Discussion Format: A collaborative discussion exploring strategies for simplifying institutional client onboarding while improving operational efficiency and maintaining compliance. Participants will share approaches to workflow redesign and automation.	Bill F. Katie M.
Transformation & Industry Best Practices	CRM Best Practices – Design, Data & Adoption	Discussion Format: A peer discussion focused on designing and optimizing CRM platforms to improve data quality, user adoption, and business value. Participants will share best practices for CRM architecture, workflow design, governance, and long-term adoption strategies.	Inder HSO Colleen N.

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Track	Breakout Session	Description	Facilitator
Data Strategy & Analytics	Measuring Sales Success – Beyond Traditional Metrics	Discussion Format: A peer discussion exploring how firms are redefining sales effectiveness through modern performance measurement. Participants will exchange ideas on KPI frameworks, outcome-based metrics, and analytics that better connect sales activity to business results.	Noel R. Katie M.
Innovation & Intelligent Automation	Transforming Customer & Lead Journeys	Discussion Format: A facilitated discussion exploring how AI/Data are transforming customer acquisition, advisor engagement, and relationship management. Participants will discuss journey mapping, personalization strategies, and the use of predictive insights throughout the client lifecycle.	Lindsay N. Bill H.
Sales, Marketing & Client Engagement	Aligning Sales & Marketing Through Data and Campaign Strategy	Discussion Format: A facilitated discussion on how firms are using shared data, common metrics, and coordinated campaign planning to improve collaboration between Sales and Marketing. Participants will discuss organizational alignment, governance, and measuring campaign success.	Bill F. Gary N.
Transformation & Industry Best Practices	Improving Marketing Campaign Measurement	Discussion Format: A peer discussion examining how firms measure the effectiveness of marketing campaigns and connect marketing activities to business outcomes. Participants will discuss implementation strategies, key metrics, reporting frameworks, and approaches to demonstrating ROI.	Inder Colleen N.