2026 Fall Forum:
Breakout Session Descriptions

THE SME FORUM

Tuesday Morning Sessions

Track	Breakout Session	Description
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.
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.
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.
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.

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Tuesday Afternoon Sessions

Track	Breakout Session	Description
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.
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.
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.
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.

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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.
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.
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.
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.

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Wednesday Afternoon Sessions

Track	Breakout Session	Description
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.
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.
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.
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.