

**MEMO# 1605**

December 20, 1989

## **SECOND ANNUAL TELEPHONE CENTER MANAGEMENT SKILLS SEMINARS**

December 20, 1989 TO: MARKETING COMMITTEE NO. 31-89 DIRECT MARKETING COMMITTEE NO. 40-89 SALES FORCE MARKETING COMMITTEE NO. 41-89 SHAREHOLDER COMMUNICATIONS COMMITTEE NO. 32-89 RESEARCH COMMITTEE NO. 36-89 SMALL FUNDS COMMITTEE NO. 9-89 MEMBERS INTERESTED IN PUBLIC INFORMATION NO. 12-89 OPERATIONS MEMBERS NO. 36-89 MEMBERS - ONE PER COMPLEX NO. 42-89 RE: Second Annual Telephone Center Management Skills Seminars

For the second year, the Institute will host a series of regional one-day seminars for those who manage and supervise fund telephone representatives. The seminars will be held in San Francisco, New York, Kansas City, and Boston in February and March. They will feature presentations on ways to improve the supervisory and management skills of those who run shareholder service, direct marketing, and broker/dealer service organizations. Speakers will include industry executives, as well as outside experts. Each seminar will also include a group discussion, during which attendees can meet and discuss areas of common concern with telephone center managers and supervisors from other fund groups. Registration for these seminars will be limited to employees of ICI member organizations and their transfer agents, as well as other non-members who have a business relationship with an ICI member fund group. Please register early, as space will be limited and it may not be possible to accommodate walk-in registrations. Topics to be Covered These seminars will focus on providing attendees with ideas that they can use in the management of their own telephone centers. Topics to be covered include: \* How the Telephone Center Fits Into Fund Marketing Plans and Operations \* Interviewing/Hiring/Compensating Fund Telephone Representatives \* Training Fund Telephone Representatives \* Motivating Fund Telephone Representatives \* The Regulatory Aspects of Running a Fund Telephone Center \* Discussion Group Dates and Locations o San Francisco February 7, 1990 Sheraton San Francisco Airport 1177 Airport Blvd. Burlingame, CA 94010 415/342-9200 o New York February 27, 1990 Halloran House 525 Lexington Avenue New York, NY 10017 212/755-4000 o Kansas City March 8, 1990 The Westin Crown Center One Pershing Road Kansas City, MO 64108 816/474-4400 o Boston March 28, 1990 The Lafayette Hotel One Avenue de Lafayette Boston, MA 02111 617/451-2600 Price includes lunch. All seminars will begin at 9:30 a.m., and end at approximately 4:15 p.m. How to Register To register, fund group employees should complete the attached registration form and return it, along with a check for \$150 for the first registration from the fund group, and \$100 for each additional registration from the same fund group. Non-members should submit a check for \$150 for each registration. Mail to: Ms. Claire Gurnee Investment Company Institute 1600 M Street NW Suite 600 Washington, DC 20036 REGISTRATION FORM INVESTMENT COMPANY INSTITUTE 1990 TELEPHONE CENTER MANAGEMENT SKILLS SEMINARS LOCATION (check one) San Francisco

\_\_\_\_ New York \_\_\_\_ (Feb. 7) (Feb. 27) Kansas City \_\_\_\_ Boston \_\_\_\_ (March 8) (March 28)  
PLEASE TYPE OR PRINT Name(s) and Title(s)

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\_\_\_\_ Name of Organization \_\_\_\_\_

ICI Member Firm (if different)\* \_\_\_\_\_ Address \_\_\_\_\_

\_\_\_\_ City, State, Zip \_\_\_\_\_

Telephone Registration Fee \_\_\_\_ \$150 First Registrant from Institute Member Organization  
\_\_\_\_ \$100 Each Additional Registrant from Same Member Organization \_\_\_\_ \$150 Each Non-  
Member Registration Total Fees \$\_\_\_\_ (Check made out to Investment Company Institute)

Return to: Ms. Claire Gurnee INVESTMENT COMPANY INSTITUTE 1600 M Street, NW Suite  
600 Washington, DC 20036 \* If registrant is not employed by an ICI member firm, please  
provide a letter from a ICI member stating the relationship of the registrant to the member  
organization. TELEPHONE CENTER MANAGEMENT SKILLS SEMINAR PROPOSED AGENDA  
8:30-9:30 a.m. Registration and Coffee 9:30-9:35 Introduction and Welcome 9:35-9:55 Case  
Study #1 - The Marketing Side 9:55-10:15 Case Study #2 - The Operations Side  
10:15-10:30 Question and Answer Session 10:30-10:45 Break 10:45-11:25

Interviewing/Hiring/Compensating Telephone Representatives 11:25-11:40 Question and  
Answer Session 11:40-12:00 The Regulatory Aspects of Running a Fund Telephone Center  
12:00-12:15 Question and Answer Session 12:15-1:30 Luncheon 1:30-2:10 Training  
Telephone Representatives 2:10-2:25 Question and Answer Session 2:25-2:45 Motivational  
Ideas 2:45-2:55 Question and Answer Session 2:55-3:10 Break 3:10-4:00 Group  
Discussion/Exchange of Ideas

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