

**MEMO# 912**

January 9, 1989

## **NEW SERIES OF ONE-DAY SEMINARS FOR TELEPHONE CENTER MANAGERS AND SUPERVISORS**

January 9, 1989 TO: BOARD OF GOVERNORS NO. 1-89 MARKETING COMMITTEE NO. 1-89 DIRECT MARKETING COMMITTEE NO. 1-89 SALES FORCE MARKETING COMMITTEE NO. 1-89 SHAREHOLDER COMMUNICATIONS COMMITTEE NO. 1-89 OPERATIONS COMMITTEE NO. 1-89 RESEARCH COMMITTEE NO. 1-89 SMALL FUNDS COMMITTEE NO. 1-89 MEMBERS INTERESTED IN PUBLIC INFORMATION NO. 1-89 OPERATIONS MEMBERS NO. 5-89 RE: New Series of One-Day Seminars for Telephone Center Managers and Supervisors

"Telephone Center Management Skills" is the name of the Institute's new series of regional, one-day seminars, which will be held in three cities this March. This new series of seminars will feature presentations on ways to improve the management and supervisory skills of those who run shareholder service telephone centers, broker/dealer service telephone centers, and inbound telemarketing operations. The program will be designed to meet the special needs of those who manage mutual fund telephone representatives. Speakers will include industry executives, as well as outside experts. In addition, during lunch, registrants will have an opportunity to meet and exchange ideas 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. Some of the Topics to be Covered o Interviewing/ Hiring/ Compensating Mutual Fund Telephone Representatives o Training Mutual Fund Telephone Personnel o Ideas for Motivating Mutual Fund Telephone Personnel o Current Issues in Mutual Fund Telephone Center Management o New Technology for the Mutual Fund Telephone Center o Case Studies--tips and ideas from those who manage successful fund telephone centers o And More! Dates and Locations o Chicago March 1, 1989 Hotel Nikko 320 N. Dearborn Chicago, IL 60610 312/744-1900 o New York March 8, 1989 The Warwick Hotel 65 W. 54th Street New York, NY 10019 212/247-2700 o Boston March 15, 1989 The Ritz-Carlton 15 Arlington Street Boston, MA 02117 617/536-5700 The seminars will begin at 9:30 a.m., and will end at approximately 4:00 p.m. Luncheon will be included in the registration fee. 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, and \$100 for each additional registration. Non-members should submit a check for \$150 for each registration. Mail them to: Ms. Claire Gurnee Investment Company Institute 1600 M Street, NW Suite 600 Washington, DC 20036 Please make your own hotel reservations. Special room rates have been arranged at each hotel. Please inform the hotel that you are attending an Investment Company Institute seminar. Additional Information For more registration or logistical

information, contact Lauren Graham at 202/955-3576. For additional program information, please call me at 202/955-3536. Stephanie Brown Marketing Director  
REGISTRATION FORM  
INVESTMENT COMPANY INSTITUTE TELEPHONE CENTER MANAGEMENT SKILLS LOCATION  
(check one) Chicago \_\_\_\_ Boston \_\_\_\_ (March 1) (March 15) New York \_\_\_\_ (March 8) 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 Registrant 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 your firm is not an ICI member, please provide the  
name of the ICI member with which your firm has a business relationship.

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