

MEMO# 3939

July 17, 1992

FOURTH ANNUAL TELEPHONE CENTER MANAGEMENT SKILLS SEMINAR

July 17, 1992 TO: MEMBERS - ONE PER COMPLEX NO. 21-92 OPERATIONS MEMBERS NO. 27-92 DIRECT MARKETING COMMITTEE NO. 23-92 MARKETING POLICY COMMITTEE NO. 26-92 RESEARCH COMMITTEE NO. 10-92 SALES FORCE MARKETING COMMITTEE NO. 23-92 SHAREHOLDER COMMUNICATIONS COMMITTEE NO. 19-92 SMALL FUNDS COMMITTEE NO. 7-92 MEMBERS INTERESTED IN PUBLIC INFORMATION NO. 6-92 RE: FOURTH ANNUAL TELEPHONE CENTER MANAGEMENT SKILLS SEMINAR

For the fourth consecutive year, the Institute will sponsor regional one-day seminars for those who manage and supervise fund telephone representatives. The seminars will be held this fall in three cities: Chicago, New York, and Boston. They will feature ideas for ways to improve the supervisory and management skills of those who run shareholder service and wholesaler support sales operations. Speakers will include industry executives, as well as outside experts. Registration for these seminars will be limited to employees of ICI member organizations and their transfer agents and telemarketing firms. 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 and insights into how others manage their telephone operations. Issues of interest to managers of both sales and service telephone groups will be addressed. A preliminary agenda for the sessions is attached. Dates and Locations o Chicago September 9 Chicago O'Hare Marriott 8535 West Higgins Road Chicago, IL 60631 312/693-4444 o New York October 15 New York Marriott Eastside 525 Lexington Avenue New York, NY 10017 212/755-4000 o Boston November 13 Sheraton Boston Hotel & Towers 39 Dalton Street Boston, MA 02199 617/236-2000 Lunch will be served. All seminars will begin at 9:30 am, and end at approximately 4:00 pm. How to Register To register, fund group employees should complete the attached registration form and return it, along with a check for \$175 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 \$250 for each registration, as well as a letter from an ICI member stating the relationship of the registrant to the ICI member firm. Mail to: Conference Registration Investment Company Institute 1600 M Street NW - Suite 600 Washington, DC 20036 More Information For more information on the program for these seminars, please call Stephanie Brown at 202/955-3536 or Barbara Levin at 202/955-3540. For more information on how to register for these seminars, call at 202/955-3508. Stephanie Brown Marketing Director Barbara Levin Director-Sales Force Marketing and Financial Planning Services REGISTRATION FORM INVESTMENT COMPANY INSTITUTE 1992 TELEPHONE CENTER MANAGEMENT SKILLS SEMINARS LOCATION (check one) Chicago ☐ New York ☐ (September 9) (October 15) Boston ☐ (November 13) PLEASE TYPE OR PRINT Name(s)

and Title(s) _____

_____ Name of Organization _____

ICI Member Firm (if different)* _____ Address _____

_____ City, State, Zip _____

Telephone Registration Fee ____ \$175 First Registrant from Institute Member Organization
____ \$100 Each Additional Registrant from Same Member Organization ____ \$250 Each Non-

Member Registration ____ Total Fees (Check made out to Investment Company Institute)

Return to: Conference Registration INVESTMENT COMPANY INSTITUTE 1600 M Street, NW -
Suite 600 Washington, DC 20036 * Non-members: Please supply a letter from a member

stating the relationship of the registrant to the member firm. INVESTMENT COMPANY

INSTITUTE 1992 TELEPHONE CENTER MANAGEMENT SKILLS SEMINAR PRELIMINARY AGENDA

9:00-9:30 Registration and Coffee and Pastries 9:30-9:50 Welcome and Introduction

9:50-10:50 Interviewing, Hiring and Compensating Sales and Service Representatives

10:50-11:05 Question and Answer Session 11:05-11:20 Break 11:20-12:05 The Regulatory

Aspects of Running a Fund Telephone Center 12:05-12:15 Question and Answer Session

12:15-1:30 Luncheon 1:30-2:30 Training Sales and Service Representatives 2:30-2:45

Question and Answer Session 2:45-3:00 Break 3:00-4:00 Ideas For Motivating Telephone

Representatives 4:00-4:10 Question and Answer Session

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