

MEMO# 33777

September 20, 2021

ICI Member Firm's Journey Implementing a CRM Solution with Sales & Asset Reporting

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TO: Small Funds Sales and Marketing Subcommittee RE: ICI Member Firm's Journey Implementing a CRM Solution with Sales & Asset Reporting

Join Adam Glidden from Impax Asset Management, David Halligan from MARS and John Randall, ICI November 9 at 2:00 pm ET for a discussion about Impax's journey implementing the MARS CRM with sales and asset reporting.

This session will explore:

- Deciding between in-house vs. vendor solution
- Strategies for sourcing data
- Measuring success

Selecting and implementing the appropriate tool is a critical project for smaller asset managers. Join us to learn from Impax's journey and ask questions during this interactive session.

Advance Questions

Committee members or their substitutes are encouraged to submit advance questions/topics either through the online registration process or to John Randall at john.randall@ici.org 202-326-5930. The meeting will allow for in session questions as well.

Online Registration

To register for this small fund sales & marketing subcommittee session, please visit our registration site at <https://cvent.me/n9KI5g>. Please note that the only way to register for the sessions is through the Cvent link above. Log in details will be sent to registered attendees only. More than one person from each firm is welcome participate, however please have each person individually register for the sessions. That will allow us to keep track of attendees and send updates to registered guests as needed.

Post Registration Instructions

At the end of your registration, on the confirmation page, please click the "Add to Calendar" button and select ICS file. Please download each calendar hold which will be the sessions you signed up for. This will be a hold only. You will receive your unique link for your sessions 1 day before the meeting and 1 hour before each session. To make this process smooth, please flag your first email as all the sessions will be in the first email.

If you have questions about registration, please contact Magen Dargon at 202-326-5943 or magen.dargon@ici.org.

We look forward to seeing you online!

John Randall
Director, Operations and Distribution

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