

# AGENDA

## MANAGING OMNI CHANNEL DELIVERY STUDY GROUP

November 13–14, 2019

Ferrington House Inn, Chapel Hill

Dress Code: Business Casual

### Wednesday, November 13

12:00pm	Lunch	The Belted Goat
1:00pm	<p><b>Introductions of Participants and Sponsors:</b> <i>Participants</i> describe their business model and how they serve different customer segments</p> <p><i>Sponsors</i> provide an overview of their business and how they support providing financial advice on digital platforms and through investment call centers, as well as traditional across-the-desk advisors</p>	Upstairs at McIntyre's
2:00pm	<p><b>How Do Clients Want to be Served?</b></p> <p>Kehrer Bielan research demonstrates that many clients with small accounts have substantial assets held elsewhere. Cutting off access to a traditional across-the-desk advisor might drive them away.</p>	
2:30pm	<p><b>Case Study of Implementing a Digital Advice Platform -- Key Bank:</b> Kevin Burke</p>	
3:00pm	Break	
3:15pm	<p><b>Serving "Small" Accounts: The Cost to Serve Clients in Investment Call Centers vs Across-the-Desk Advisors:</b> Ken Kehrer</p> <p>Kehrer Bielan research on how investment call center advisors and their managers are paid opens a window on the cost-to-serve clients.</p>	
4:00pm	<p><b>The Benefits of Advisor Teams</b></p> <p>Teams can be structured so that different levels of service are provided by various team members. Kehrer Bielan research demonstrates how teams improve business performance.</p>	
6:00pm	Reception	The Garden House
7:30pm	Group Dinner	Ferrington House Inn

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### Thursday, November 14

7:30am-9:00am	<b>Breakfast</b>	Ferrington House Inn
9:00am	<b>Omni Channel Delivery of Financial Planning:</b> <i>Participants</i> describe how they deliver financial planning to each market segment, and the extent to which advisors have incorporated planning into the way they do business  <i>Sponsors</i> describe how they support the transformation of investment sales professionals into holistic financial advisors	Upstairs at McIntyre's
9:45am	<b>Financial Planning as the Platform Supporting Omni Channel Delivery.</b> Leigh Van Heule, Chip Petty, and Kristefor Lysne	
10:30am	<b>Break</b>	
10:45am	<b>Lessons from a Mature Investment Call Center: the Ameriprise Centralized Advisor Call Centers.</b> Kelli Zandstra  Building on 18 years of institutional experience, 140 Financial Advisors provide financial advice remotely	
11:30am	<b>Open Discussion of Other Issues</b>	
11:45am	<b>Upcoming Initiatives at Kehrer Bielan Research &amp; Consulting</b>  Surveys, research, consulting, and study groups	
12:00pm	<b>Wrap up and Lunch</b>	The Belted Goat

#### Additional Information:

**Hotel Checkout is at 12pm.** Please factor in 40 minutes of travel time to the Raleigh-Durham airport. Taxis are not readily available.