

PriceMetrix®

# CLIENTSUMMIT2011

SESSION HANDBOOK

**Welcome:** to the inaugural PriceMetrix Client Summit 2011!

As a valued client and a long-time supporter of PriceMetrix, we are happy to have you join us to explore topics that benefit us both and promote our partnership. This Summit is the ideal opportunity to get to know and learn from peers and other PriceMetrix clients. Today you will meet and watch industry experts present the latest topics that touch and benefit your business.





## AGENDA \ Wednesday, September 28, 2011

Registration opens at 9 am.

- |          |  |         |   |
|----------|--|---------|---|
| 9:15 am  | <b>Introduction:</b><br>Opening and Welcome Address<br><br>by Doug Trott, CEO and President, PriceMetrix                               | 1:00 pm | <b>PriceMetrix Product Update II:</b><br>What We Are Working On<br><br>by Jodi Brooks, Director, Product Management, PriceMetrix  |
| 10:00 am | <b>Keynote:</b> An Introduction to Pricing in a Knowledge Economy<br><br>by Ronald J. Baker, Founder, VeraSage Institute and Author    | 1:30 pm | <b>Panel Discussion:</b><br>The Changing Context of Value – the Impact of Regulatory Reform on Advisor Practices and Business Models<br><br>by Bradley Kellum, Oliver Wyman & Prema Thiele, Borden Ladner Gervais |
| 11:30 am | <b>PriceMetrix Product Update I:</b><br>Lessons Learned<br><br>by Patrick Kennedy, Co-Founder and VP Product & Technology, PriceMetrix | 2:30 pm | Break   |
| 12:00 pm | Lunch  | 3:00 pm | <b>Facilitated Discussion:</b><br>Getting the Most Out of PriceMetrix   |













**Amrita Mathur** Director, Marketing, PriceMetrix

Amrita joined PriceMetrix as Director, Marketing in the summer of 2011. In her role she leads the team responsible for building and executing against an annual marketing plan, including brand development, thought leadership, content planning and campaign management.

At PriceMetrix, Amrita works closely with Product Management and supports both Sales and Client Services with timely, relevant communications and tools.

Amrita is a results-focused strategic marketer with a technology background and much expertise in product marketing, messaging and positioning for the B2B and Enterprise software space.

Prior to joining PriceMetrix, Amrita has lead marketing teams in a variety of enterprise software companies focused on various verticals including finance, insurance and telecommunications. Amrita brings her passion for digital strategy and content marketing to PriceMetrix and is working towards establishing a larger footprint for the practice intelligence firm.

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### Your Emcee for today!

We hope the sessions and topics explored today provided you with valuable information and insights that you can apply to your business. I look forward to hosting you at the next PriceMetrix Client Summit!



### Thank you: for attending the PriceMetrix Client Summit 2011

You are here because you're leading the industry. You're all created great results with our product and your leadership and are amongst the first to have combined Practice Management with Business Intelligence.

We hope you have made some friends today and feel part of a greater collective. That is our goal - to make this Client Summit a recurring get together, so we can all share industry best practices and learn one another to continue leading.

A short survey will be sent to you following the event in order to gauge your experience so as to improve future PriceMetrix Client Summits.

For any questions or concerns during the remainder of the event, please do not hesitate to contact the PriceMetrix Client Summit team:

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