

Performance Analytics Technology & Presenting Performance



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Ian Thompson, Ph.D., BNY

Alex Shafran, Cohen & Steers

Shankar Venkatraman, CFA, FRM, American Century Investments

Moderator: Patrick W. Fowler, TSG

Meet Our Panel

- ✓ **Ian Thompson, Ph.D., BNY**
- ✓ **Alex Shafran, Cohen & Steers**
- ✓ **Shankar Venkatraman, CFA, FRM, American Century Investments**

Questions for our Panel

Questions

- ✓ What are some problems/issues that mandate a call for a performance platform evolution or transformation?
- ✓ What are the different operating models and what are the challenges or points to consider when reviewing these - and what role should the performance team have in this?
- ✓ Who should ultimately be responsible for choosing the right technology solution for your firm?

Questions

- ✓ Who are the partners and resources needed for performance technology projects?
- ✓ How do you ensure all stakeholder requirements are covered when choosing a solution?

Questions

- ✓ How do you ensure that you have a say in your provider's product development roadmap?
- ✓ How do you ensure that the data is of sufficient quality to calculate accurate performance?

Audience Q&A



Bonus Questions

- ✓ What do you see as the biggest challenges in reporting performance?
- ✓ How do you keep on top of performance operations and how do you deal with tight deadlines?

Thank you!

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