



Asset Management: Data and Technology

Dec 6, 2018

10:30 – 12:00 AGENDA

St. Tammany 9th Floor

As we increasing turn to technology to manage and analyze our portfolios, what is our return on investment of time and money? Join us for a conversation on what members are learning—the good and the bad—through improved tracking and visualization of their asset management data, and what changes they've been able to make to improve their overall portfolio performance. There will also be time devoted to lessons learned when implementing these tools and what scenarios lead to less than optional outcomes. We'll save some time at the end to discuss how we might work together to collectively improve our performance—possibilities include peer sharing, common collection of data points, improved data systems/technology, and/or benchmarking.

10:30 **Welcome and Introductions**

10:40 **Data and Technology**

- Members share insights gained from their portfolios, along with lessons learned for implementing technology

11:20 **Collective Performance Data**

- Discuss interest in common collection of data and benchmarking tools

11:50 **Topics for Future Discussion, Wrap Up, and Next Steps**

12:00 **Adjourn**

