

Tips From The Pros



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Prepared by
Charnley & Røstvold, Inc.

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Thank You

Thank you to all who contributed to our third edition of “Tips From The Pros.” We believe it is one of the best ever!

Several contributors provided multiple tips. We grouped their remarks together and enclosed in quotations.

The Charnley & Røstvold Team



Interview Questions For New Team Members

- “What experience do you have taking the lead on team projects?”
- Do you have any experience doing the relevant job (writing, project management, market research, performance calculation, etc.)?
- How well do you work under pressure?”

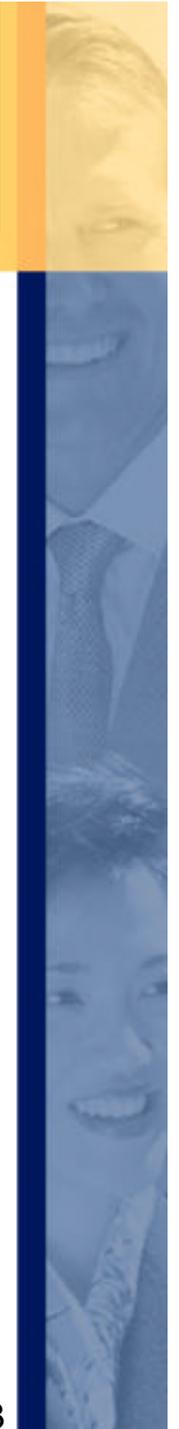
- “Can you work with people who will challenge you?”
- What is the one thing that makes you think this is the job for you?
- Who comes first, the client or your team?”

- “What attracted you to the investment management industry?”
- What aspects of this industry appeal to you the most?
- What type of environment works best for you?
- Explain situations where you have made a difference.”

- “What do you feel you need in a job to be at your best?”
- How do you deal with challenges, both positive and negative?
- What attracts you to being a part of this team?”

- “What is truly your goal and have you developed a plan to reach it?”
- Please describe a stressful situation you had and what steps you took to work through it? Was there any feedback based upon your actions?
- Picture your closet at home. Now describe its contents. (Note: you can substitute a car trunk instead)”

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Interview Questions For New Team Members

- “Describe a project or something you initiated of which you are proud.
- For what kind of work environment are you looking?
- Describe a situation where you had to go above and beyond to provide client/customer service.”

- “What are you passionate about, what makes you get up out of bed each day and look forward to going to work?
- What would your supervisor say about your performance?
- What are your strengths and weaknesses?”

- “Why are you considering a change?
- If we were to speak with your current boss, what would he/she identify as your strengths and weaknesses?
- Explain a recent challenge that you experienced at work and the outcome.”

- “Do you understand how critical the function you perform is to the success of the overall firm? Describe why you think it is critical.
- Do you appreciate that this job may require significant additional effort that falls outside the normal work hours and that getting the job done accurately, professionally and timely are critical to the success of the overall effort? How will you make sure you have the time to succeed?
- Are you willing to support the overall team goal, understanding that you may have to work extremely closely with others and, in some cases, help them with their work? How do you integrate into a team?”

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Most Effective Training Exercises

- “When someone new joins the team, I try to get as many of the existing team members to assist in the training process. I want the new person to immediately feel part of the team, be more relaxed, and better able to learn what we do and the importance of the role he/she is providing. On the flip side, this exercise often refreshes the existing team members’ understanding of the group's policy and procedures.”
- “Applies more to planning than training, but off-site gatherings with an outside facilitator, and an agreed upon agenda and goals set ahead of time.”
- “Team goal setting and developing a team vision statement in an offsite meeting.”
- “For those in Marketing Services, writing coherent and concise RFPs is good training. Also, spending time with portfolio managers and understanding where they are coming from is useful, but should not be overweighted when determining what works and what doesn’t.”
- “The Herman Brain Dominance Instrument (HBDI). Instead of segmenting people into ‘left brain’ or ‘right brain’ thinkers, it provides an understanding of how the whole brain works together to include such components as logic, organization, interpersonal relationships and artistic ability. The HBDI also provides tools to communicate effectively with people based on their personalities. Used in a team setting, the HBDI has given us insight into the personalities of each member and helped us improve our communication styles. We have also used it to interact with clients and business partners.”
- “It all depends on the team's objectives and the degree to which they have direct client contact.”

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Most Effective Training Exercises

- “Working with our Marketing group in one-on-one sessions facilitated by a consultant to hear first-hand information about how they work and how the web will enhance their servicing potential.”
- “Repetitive sessions and practical applications of the skills – basically, use it or lose it.”
- “Best team bonding exercise is doing something physically challenging together. Best skills training exercise is learning the skills and applying them to real cases – simultaneously.”
- “Avoid tentative language such as: ‘I think,’ ‘it is kinda’ and ‘we sorta.’ Use active versus passive voice.
- Pause to make your point; once you have answered a question or finished a statement, pause, then resume. This shows you are in control. 3-5 second count is good, then resume.
- When new to a firm, or, new to a department, interview the veterans or key people about the history, background, progress. Ask the same questions to each; the repetitive responses will help you grasp key messages. Schedule mock presentations with team members, such as answering, ‘What does your firm do?’ Conduct the session as though it were real-life and have team members provide feedback and suggestions for improvement.”

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Team Motivators

- “Acknowledgement: Team leaders and the users of the information directly thanking the team members for the work they have done.
- Always focusing on the fact that people are a member of a team, and that you can rely on your team members to help you on a project.
- Encouraging continuing education.”
- “Sharing success and recognition all the way down the line, and constantly saying thank you.”
- “Recognition of hard work, extra effort and good teamwork of both individuals on the team and the team as a whole. People who are self-motivated get a boost from a well-deserved pat on the back.”
- “The best motivation is strong, positive leadership, and clearly defined goals and rewards.”
- “Constant positive feedback. Always saying ‘please,’ ‘thank you’ and ‘great job’ in a pleasant voice will get you far. Talking to the group and asking them their feedback on certain issues. Including individuals on correspondence makes them feel not only part of the team, but that their voices are being heard.”
- “An incentive compensation program that recognizes and captures an individual’s value added to garnering assets.”

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Team Motivators

- “Recognition, which can come in a variety of ways including monetary awards, gift certificates or time off. We have found that many team members are motivated by written and verbal praise, which might be delivered at a team meeting or through an e-mail to all team members and appropriate supervisors.”
- “Saying thank you, and recognizing contributions.”
- “Recognition for successful accomplishment – and lots of it. Compensation is OK for influencing desired behavior, but it tends to be short-term in effectiveness.”
- “Best motivation is to see the tangible, financial results of a project. Financial reward and recognition.”

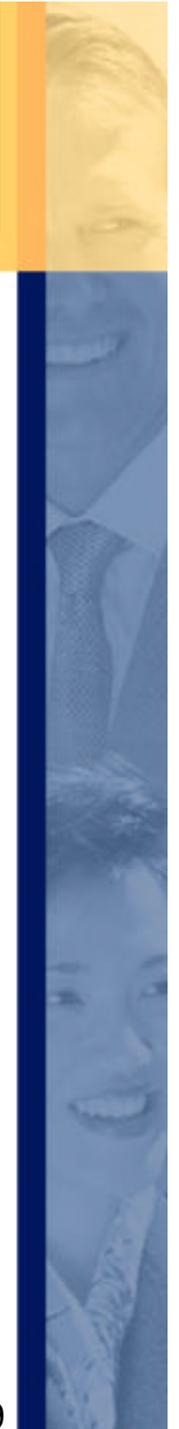
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Team De-Motivators

- “Too much work, too little time.
- Deconstructive criticism - Heavily criticizing a staff member directly for a mistake made by the team - sometimes it is easier to go directly to the manager so the manager can work directly to fix the problem.
- No recognition for a job well done.”
- “Secrecy, big egos at the top, and indifference to others on the team.”
- “Lack of communication. Let everyone know what is going on and include the whole team on wins and losses. Decisions cannot be made in a vacuum or by a dictator. A team will fall apart without communication.”
- “Lack of visibility within a company leads to a team feeling unimportant. All teams within a company have a purpose which senior management needs to validate as often as possible through recognition.”
- “Divisiveness at any level. Lack of a common identity and goal among different units.”
- “No feedback, rudeness, unclear directions.”
- “To have a senior management that doesn’t appreciate the incredible value added by Sales and Marketing to the top and bottom lines of a company's economic success.”
- “Making too much out of something that may have gone wrong.”

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Team De-Motivators

- “Lack of communication. If you are not communicating with your team and have little time for your colleagues and operate within a ‘closed-door’ environment, your team is likely to become disconnected and unmotivated.”
- “Lack of direction, lots of wasted time, inequitable distribution of work.”
- “Lack of attention from management, lack of leadership, lack of recognition of good work, and giving the wrong person on a team the leadership role.”

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Best Communications Efforts

- “Having portfolio managers speaking/meeting directly with clients to discuss portfolio results and impact of their investment decisions.”
- “In the case of a change of ownership, visiting and calling clients ahead of public announcements of the deal made all the difference. No clients left as a result.”
- “Internally: Regular staff meetings where information is shared top down. Externally: We have recently conducted web casts for our clients which have been helpful in getting the message out and highlighting our portfolio management team. Even if clients don't ‘tune in,’ they are aware of our efforts to communicate with them.”
- “Regional Client Conferences that were totally educational and non-salesy.”
- “The best have involved many people early on and continually communicated along the way, and then provided training to finish the project and initiate use.”
- “We maintain a notes system, whereby after each discussion with a client, prospect, colleague, etc., our comments are input into a central shared database and accessible to each member of our firm. This approach is most helpful as it ensures that we are all sharing information daily and are aware of developments with our clients or prospects as they occur. In addition, we hold informal meetings each morning to discuss the previous day and outline our current top priorities to ensure that the team is in ‘alignment.’”

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Advice to Newcomers to the Industry

- “Be flexible and open to working on a wide variety of projects. Each will be a learning experience.
- Continuing your education outside the firm.”
- “Set career goals that are realistic and long term. Be very honest and ethical with everyone with whom you have contact. Have fun and don’t take yourself too seriously.”
- “Stay ahead of the curve through involvement in educational programs, reading industry-related materials and learning as much about the history of your company as possible. People who work hard at doing these things will become assets to their companies in ways beyond their regular job.
- Networking with peers within the industry leads to a better and fuller understanding of how our very complex industry works.”
- “Be consistent in your approach to clients so that they always know what to expect from you.
- Work hard, read a lot (of industry publications and financial news) and build a strong network, follow-through and exceed expectations.”
- “Before you can build a penthouse, you must have a sturdy foundation. Take in each step of the process and build on it as you progress.”
- “Get exposed to all aspects of the investment industry: Attend meaningful conferences where there is obvious substance; listen well; don't be afraid to take on new challenges that appear forbidding but probably aren't; get to know the idiosyncrasies of all three stakeholders – money managers, money owners, consultants.”

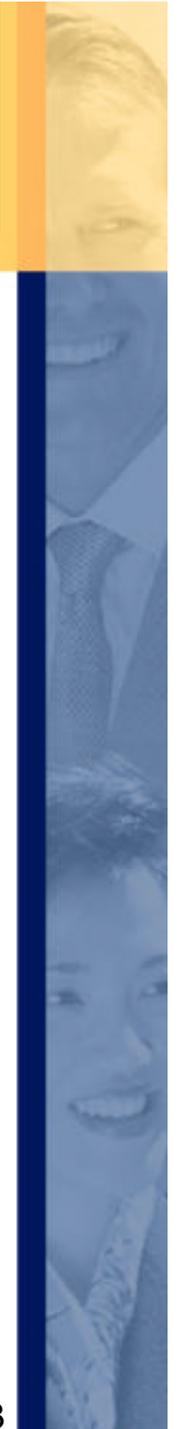
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Advice to Newcomers to the Industry

- “Be patient!! Things are always changing and time has incredible value!”
- “I worked for an investment management firm that provided a training program, whereby after three months, we were moved to a different project in a different area of the firm. After an 18-month program, I had worked with the RFP, client service, systems, operations, high net worth and institutional teams. This broad-based exposure helped me to learn about our business in a short time period. If your firm does not offer such a program, try to work with other areas of the organization in your current post. Attend outside conferences. Take classes to enhance your understanding of investments. Ask questions.”
- “Remember that ‘security’ is risk – the more you stand still, the further behind you fall.”

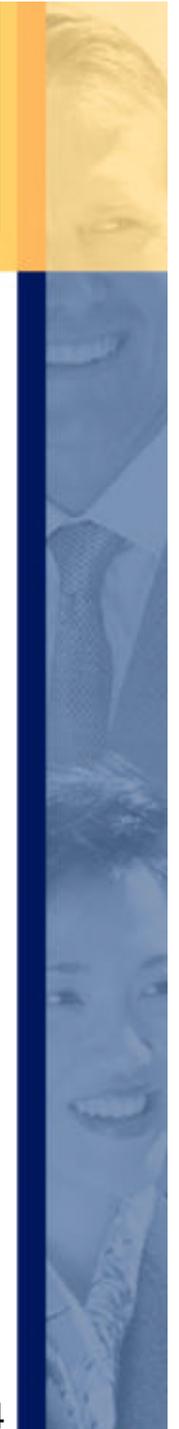
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Suggestions for Aspiring Managers

- “Learn to delegate and lead by example. Set clear goals and tasks for subordinates. Remember people can’t read your mind. Just because you know how to complete a project in a certain fashion, don’t expect someone else to do it the same way.”
- “Be willing to learn and take on any task with determination. Don’t think that you are above certain tasks. Managers notice the efforts put forth by subordinates and take complaining attitudes into consideration come promotion time.”
- “Constantly work at honing and practicing your leadership skills. Be a take-charge person without being too pushy. Develop positive ways to increase your visibility by volunteering for projects, dressing for success, helping others on your team to ‘look good.’”
- “First, take an assessment like the Birkman to learn if you have management skills. Regardless of the results, if you still want to move into management, take seminars and classes on developing management skills, read books, listen to tapes and interview people you perceive to be good managers. Ask them how they developed their management skills and for recommendations. Even once you become a manager, keep learning and training.”
- “The most important skill for any manager is listening. It is assumed that you know how the nuts & bolts all fit together. However, if you don’t listen to the engine for noise (i.e., your staff), your machine will breakdown on you. This could mean a costly repair bill.”

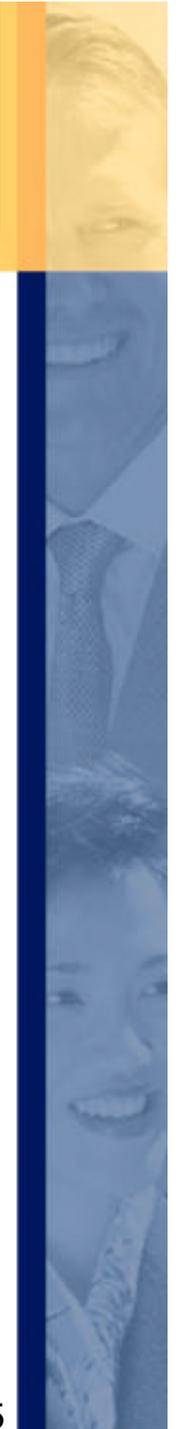
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Suggestions for Aspiring Managers

- “Don't, unless you are a frustrated HR person. If you do like solving everyone else's problems, then understand that a lot of your day is taken up with people management.”
- “Focus on developing your ‘people’ and communication skills. Your ability to communicate effectively is your strongest asset.”
- “Be prepared to do your work after 5pm. You'll be dealing with ‘people issues’ and answering questions in what you used to call your normal work day. But if you love interacting and helping people, you'll probably love it.”
- “Be careful for what you want...you may end up getting it. Most people don't (and never) realize that management is the art of getting things done through others.”

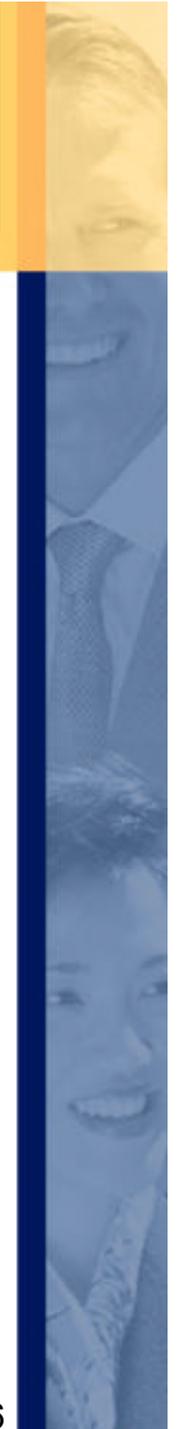
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How to Move Clients From Small Talk to Big Partnerships

- “Acquaintance or Colleague? How to move clients from small talk to big partnerships. (*Highlights from AIMSE conference May 2001*)
 - Most major multi-product organizations, who deal with institutions have total plans of \$500 million and over, have restructured their organizations to give equal weighting to client service versus sales/marketing activities.
 - Compensation programs have been revised to ensure existing clients receive levels of attention equal to (or greater than) prospective clients.
 - The level and amount of client services offered will vary with the size and sophistication of the client. Several managers have formed ‘Strategic Services Groups’ offering services previously provided only by consultants.
 - New methods of communicating with clients (web sites) will grow in importance in client servicing , but they will augment, not replace, the traditional hands-on work conducted by a Relationship Manager.”

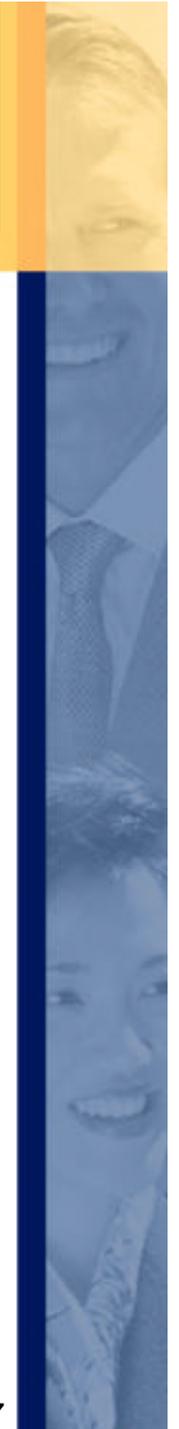
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Reporting Bad Performance

- “No sugarcoating, address it up front and have specific reasons for the underperformance. Don’t be defensive, but have specific reasons why it can and will improve.”
- “If the poor performance has been short-term – provide a context by showing longer-term results.”
- “Know the contributors to the poor performance – a specific stock, industry, and/or sector, and the contributors that may have enhanced performance during that same time period.”
- “Be able to explain how the portfolio may have been re-positioned for future growth.”
- “Don’t sugarcoat the negative performance; just give an honest reason why it was negative. As long as the manager is staying true to their investment style, occasional negative numbers are not the means to the end.”
- “When reporting disappointing performance, be honest and candid about what happened. Have a strategy planned for defining the problems or reasons for the poor performance. Above all, be prompt in telling your clients and the consultants. You cannot hide!”
- “Know the reasons you underperformed and have back-up proof if possible. For example, a performance attribution report might be helpful to show whether the poor returns were due to allocation (country, sector or industry weighting), or stock-selection, or style, or a combination.”

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Reporting Bad Performance

- “Be honest in communicating the reasons and steps you have taken/are taking (if appropriate) to address the cause(s). If the reason is style-related and not due to a bad investment decision, have confidence in explaining that you performed as would have been expected. Manage expectations.”
- “Be honest and consistent. First, assuming that the disappointing performance was not related to a shift in strategy or philosophy, review your approach and why the client hired you. Then talk about performance within that context. If you talk about the performance in terms of ‘you hired us to do XYZ and we’re still doing that,’ it’s far easier for the client to respect you for adhering to your disciplines and far harder for them to fire you. After all, you’re still doing what you’re supposed to be doing...(assuming you are.)”
- “When investment performance is lower than expected, as determined by the client, it is critical that communications be timely and direct. Don’t wait for disappointed clients to contact you. Proactively explain the situation. Set reasonable expectations for what they may experience going forward. Use this opportunity to reinforce your investment philosophy and how your investment style will perform in various market environments.”
- “Don’t try to hide behind the numbers. Talk about how disappointed you are and about the fact that you know that this is not what either you or the client expects or wants. Commenting that everyone’s doing badly really doesn’t suffice...the fact is that you lost money and you’re unhappy about it. Once you’ve established the disappointment, then you can discuss why the performance was poor and what, if anything, you believe can or should be done to improve performance...and it may very well be nothing but wait until markets turn around.”

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Reporting Bad Performance

- “For client service to be effective, it is important to feel empathy for the clients and remember that poor performance is actually more difficult on them. Always be prepared to answer these questions: Have you changed anything about your process in response to your underperformance? What have you learned?”
- “Be proactive. Communicate the underperformance to your clients in a timely manner and in a historical context. Remind them of the reasons why they invested with you and of their time frame.
- Be honest, but maintain conviction. Give your clients the reasons for underperformance, but be unwavering in your investment style and philosophy.”
- “Clients would like to know two things: the rationale for disappointing performance and what is your outlook going forward. When discussing the rationale, you want to confirm to the client that your philosophy and process in managing the assets have remained the same. Next review the performance of the asset class in general, then compare it to your product. When discussing the outlook for the future, I would again stress that our philosophy and process in managing the assets have and will remain the same.”
- “Make sure everything in the book is accurate and it's on time—demonstrate exceptional client service in all ways possible.”

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Reporting Bad Performance

- “Be honest and direct. Admit mistakes, tell what’s been learned, and show you can apply it to future situations. Remember to include the client’s consultant in your communications. Supply the consultant with the necessary information to be able to answer the client’s questions.”
- “When reporting disappointing performance, the first consideration is to ensure that your firm is proactive. Contact your clients first, before they contact you. Be prepared to address the reasons for underperformance specifically. Ensure that you discuss the process and confirm for your client if the process will change as a result of the underperformance, or whether you will continue to implement your disciplines as is. If you continue implementing the same disciplines, be prepared to address the question as to why your firm is confident that the existing process will work in the future.”
- “Tell it like it is. Focus on the time period described in your policy statement - the longer, the better. Clients hate surprises even more than bad performance. Make sure they get a ‘heads-up’ before the meeting. Ideally, you have described those times when you are likely to underperform well in advance.”

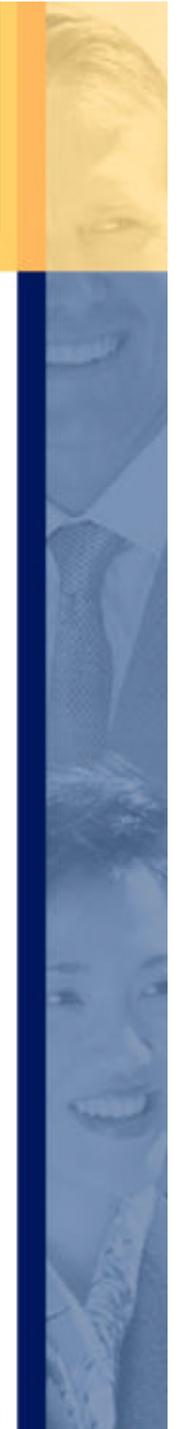
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Getting “Buy-In” When Developing New Materials

- “Have key business/investment professionals involved in the process.
- Know the key people from whom you actually need to get ‘buy-in.’
- Have a point person responsible for getting approval/buy-in from the necessary individuals to keep the process moving.”
- “Encourage and gather input from everyone on the messages that are to be communicated. Once agreed upon, set up checks along the way that the message remains valid and is reflected in the written materials.”
- “Buy-in comes from people who have a say in the final product. Involve those you want or need the buy-in from throughout the process of developing your written materials. Don't try to change things in large quantities. Have a game plan and systematically execute that game plan to achieve your results. Someone will have to make the final decision, but more people will go along with the final if they had some say in the process.”
- “You want the buy-in to occur as early in the process as possible. The more opportunity you give people to share ideas beforehand, the more likely their ideas will either be incorporated into the materials and/or a dialogue about them can take place early enough in the process so they understand the purpose of the materials.”
- “Agree upon the messages that need to be conveyed prior to revamping or initiating new materials.
- Communicate the usefulness of these materials to everyone involved.”

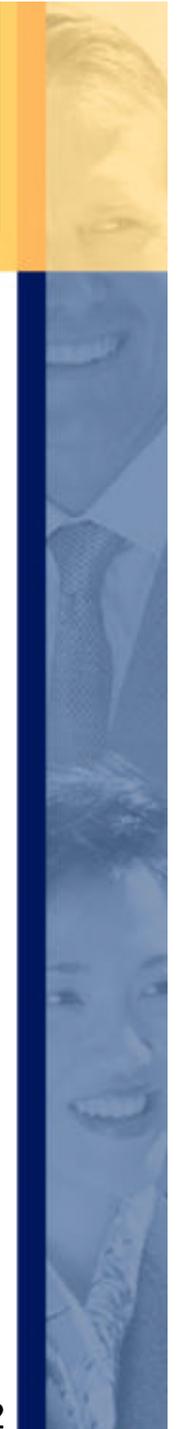
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Getting “Buy-In” When Developing New Materials

- “Remind everyone who the audience is and the importance that the message we convey as a firm is clear, concise and accurate.”
- “It is important to get all interested parties to feel like they are a part of the process and final product. At the end of the day, those who understand what works (read effective) and what does not should have the ultimate authority of what the final document looks like. Portfolio managers and analysts should supply the content where possible, and the people who understand real marketing should be responsible with packaging, promotion, pricing and style.”
- “We have found this is primarily an education process. We have actively worked to establish project procedures as well as graphic and editorial style guidelines. This has helped establish greater credibility for our sales and marketing department. As these standards become better known, it makes the job of gaining ‘buy-in’ much easier. We are able to serve a more strategic role, rather than merely serving as order takers.”
- “We ensure that the appropriate people are part of the process at the outset. Before we begin a project, we prepare a detailed work plan with each step and the deliverables we will produce throughout the process. We ensure that the entire team understands the process, deliverables and milestones. Then, when producing content, we share an outline with the team and ensure buy-in before we move to the copywriting stage. We continue sharing each draft with the team and gather their input before we proceed with drafts two and three. The key is constant communication, sign-off and a process.”

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Getting “Buy-In” When Developing New Materials

- “You could write a book about how to get buy-in. The main thing is to realize that ‘everybody’ includes the most important body of all, your external audience. So, you start with the goal, what you want them to do upon reading this information. Do you just want them to be updated or truly educated? Kill the project if the odds of this making a difference are not worth the bother (of them). To gain internal buy-in, start with a summary document of purpose – a creative brief – which covers main points, supporting evidence, tone, the role the new ‘work’ will play in the sell cycle. If you have a very specific purpose and can get the serious attention of the best, brightest and most literate within your firm, you can gain the requisite control for exceptional quality. It’s definitely worth a small task-group type of meeting. Now fill in the written argument, thinking about the dimensionality of the piece, how your external audience will ‘experience’ the document. What do they see first, what do the graphics ‘say’ in counterpoint to the information and what do you hope their action step will be. Once we worked on a nifty white paper with high production value, but absolutely no cheesy metaphors, steeped in tables and cool answers to the questions we knew the audience was sitting on (it was a ‘new’ asset category and we had done qualitative research on their biases). Guess what the readers did: asked for comments from their consultants. We learned later from one pension consulting firm that they had received ten copies from ten different clients. Now that’s buy-in.”
- “Establish your key stakeholders and gain consensus there first. Route to a broader group with revisions from the first group. Then route again to the entire group for a final look. (Of course there are many iterations in this process, not just a few.)”

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Web Sites - What Would You Do Differently?

- “I would have:
 1. Secured a budget
 2. Created a technology team – internal and vendor. Also need a clear division of labor.
 3. Created a strategy
 4. Established a strategy-driven deadline – I thought the one we had (before year 2000) was an artificial one. No reason was ever given to me why that was the deadline.
 5. Streamlined the various businesses (retail, institutional) and made sure there was agreement/consistency among the different marketing departments (retail, institutional, corporate)
 6. Had a true leader (sponsor) who could make key decisions on both technology and business ideas. This needs to be that person's full-time job, not just another ‘project.’”
- “When we first developed our site, we had no idea what kind of information would be useful to users of the site - clients, consultants, potential clients, the press and future owners of the firm. At that time, no one really knew how important a web site would be and how much value it could provide. Probably any firm would want to revamp their web site after 3-5 years to bring it more up-to-date. We are in the process of doing that now. We will place client account information (within secured extra-net accounts) on the site, along with all the product information consultants seek at the end of each quarter. Our biggest challenge will be to convince consultants to come to our site for all the information they need at the end of a quarter - rather than the other way around, which is obviously how it works now.”
- “Make it simple, easy to use and don't try to cram everything that has ever been written about your firm and your products into the web site content. Also, one must have a separate site for the Institutional Market.”

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Web Sites - What Would You Do Differently?

- “We are currently redoing our site to be more user-friendly. We have reorganized the navigation and rewritten much of the content. Given a chance to turn back time, we would have liked to have done this the first time around. When we first launched our site, we felt it was very important to have a presence. Now we realize clients and prospects want more sophisticated information and navigation.”
- “Conduct user-testing. The information we gleaned from user-testing on the latest launch of our web site has been invaluable. Because you can never completely understand the thought processes of visitors to your site, testing will help you understand if your site's architecture is intuitive to a wider audience. Use a cross section of clients, prospects, consultants and internal sales, client service and back office professionals. Ask them to answer questions such as, ‘What is your investment philosophy?’ The goal is to see if they can navigate to the section in your site that gives the investment philosophy of your firm. If you see a trend in terms of difficulty locating that section, you may want to rethink your site's design or architecture in that area.”
- “Post audio/video commentary
- Provide more information for clients to access – professionals listing with pictures, thought papers, more philosophy and process language.
- Consider posting surveys that clients can complete and send back to the firm.
- Schedule training times with clients to go through the site to increase usage.”

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Web Sites - What Would You Do Differently?

- “Pay careful attention to naming conventions for attached files, and develop a directory structure that minimizes the work involved to update attachments with new versions.”
- “There are three initiatives that often are taken for granted and that can have a significant negative impact on the success of a Web site development project:
 1. Develop consensus first.
 2. Make use of your existing assets.
 3. Plan for ongoing maintenance.

1. Develop consensus first.

The evolution of the Web has led to great excitement about new Internet initiatives, even during the current economic downturn. The lure of creating something so visual and dynamic can be enticing, but should be tempered with solid planning *before* embarking on this new initiative.

Questions like these might seem simple, but gaining consensus around these issues is critical:

- What is the goal of the web site? Is it to generate publicity, increase sales (and if so by how much), educate your consumers/clients, or to provide business efficiencies?
- Who is ultimately responsible for approval? How many people have input?
- Where does building the web site stack up against other corporate initiatives?
- What is everyone’s time commitment to the project?

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Web Sites - What Would You Do Differently?

Determining the goal of the web site is probably the most important decision, and the one that is most often overlooked. This agreement will provide a rational, business foundation to subsequent decisions that often seem objective. This makes it easy as the owner of the project to help guide influencers and make judgment calls when needed. For example, the following questions should not be driven by business goals instead of personal preferences: What should the overall look and feel of the web site be? What tone should the copy take? How much copy should be written? What should the information architecture be?

Ensuring that you have agreement at the beginning of the project will make it much easier to gain consensus when it comes time to make tough decisions about even the smallest details.

2. Make use of your existing assets.

Although the Web is a very visual experience, it is essentially about providing content to your users – customers, clients, employees, business partners. Make use of the content and assets you already have. Many of our clients waste time creating new content, or they bury existing content so deep in their web sites that the content is useless.

Also remember that less is more, particularly on the web. Users go to web sites for content, not for entertainment. They are trained by easy navigation and the interactive nature of the web to have very little patience. They do not want to sift through pages and pages of content to find the information they need. The easy way to ensure that you create a positive user experience is to repurpose existing content and create new content in the form of easily digestible chunks.

**tips
from the pros**

Web Sites - What Would You Do Differently?

3. Plan for ongoing maintenance.

Companies spend thousands, sometimes millions of dollars on the actual development and launch of their web sites, but often thoughts of ongoing maintenance and support are left until the last minute. This can lead to budget overruns and dissatisfaction with the web site as soon as it is launched.

Consider the following questions:

- Who is responsible for maintenance? Do you have an in-house Webmaster, or do you want to establish a maintenance contract with your web development partner?
- What budget do you have for ongoing web site initiatives?
- What business processes do you need to put in place to ensure that it is easy for authors, approvers, and stakeholders to provide ongoing input into the growth of the web site.
- As you plan for maintenance, does that have an impact on your design or software purchases? For example, do you need a Content Management System? Should the designers be building graphics that can be easily replaced when needed?

When you plan for these items at the outset of the project, it eliminates a last-minute rush to take care of things that take away from the main focus of the project, such as writing last-minute content and doing quality assurance on the web site.”

- “I would suggest that before putting anything that is time sensitive on the web, a process for updating the data must be ready to go, so clients and prospects are looking at the most recent data available.”

**tips
from the pros**

What Would You Improve at Your Firm, and How Would You Achieve That Improvement?

- “Raise the concept of the customer being the #1 priority by having every action taken within the firm be taken after considering how clients will be affected. It doesn’t positively affect the client, it probably isn’t important enough. Buy-in for this concept must start with top management.”
- “Communication is still the number one area I would like to see the firm improve on. There has been a current push by the Executive Management to make sure communication is ‘pushed out’ to all. To me, this is a powerful step and the only way to improve communication is if it starts at the top.”
- “Get rid of ‘dress down.’ Important people don’t take you seriously when you are in a golf shirt and slacks.”
- “One would be to encourage everyone to take a moment and relax!”
- “Learn what motivates the accounts payable departments of my clients.”

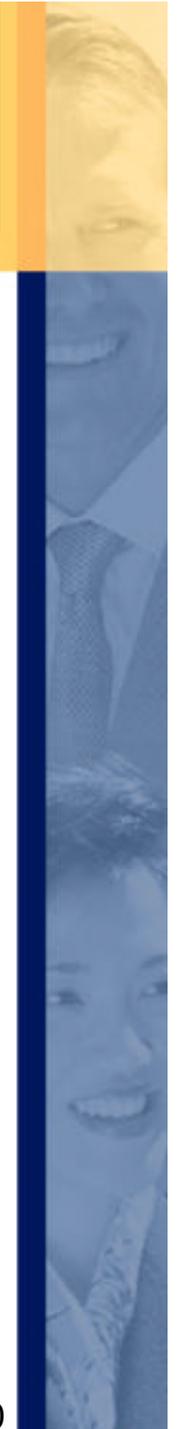
**tips
from the pros**



Giving Successful Presentations

- “Ask the four key questions
 - Who do we want to reach?
 - What do we want to say?
 - What is the most important idea?
 - Why should our target audience believe us?
- Know what wins
 - Organizational/intellectual framework
 - Connecting with your audience
 - Clarity of philosophy and approach
 - Brilliance
 - Passion
- Connect by
 - Building rapport = ‘yes’
 - Managing your feelings around criticism: ‘reflect, respect, respond’
 - Eliminate ‘but.’ They hear ‘no’”

**tips
from the pros**



Disaster Recovery Plans

- “Be sure to have an updated listing of all your employees with accurate, up-to-date home, work, and cell phone numbers. We update our listing on a monthly basis and actually hold ‘emergency phone tree’ exercises periodically to ensure everyone knows the procedures for calling employees in an emergency situation. It's critical that all phone numbers are up to date and that all employees have a copy of the listing.
- Educate employees in advance on what to do in the case of an evacuation. Make sure employees know the building's evacuation procedures, have a designated meeting spot outside of the building, and an established point person who is responsible for ensuring that all employees are accounted for at the meeting spot.
- Back up computer files and store them offsite so they can be retrieved if the building suffers damage and onsite computers are inaccessible or destroyed.
- For longer-term disaster recovery, have a plan for alternate work sites where you can run essential business out of a temporary facility. For example, our firm has arrangements with an offsite facility that will provide computers, phones, copiers and other essential office equipment if we are unable to work from our main building for an extended period of time.
- Most importantly, ensure all employees are educated about and aware of whatever disaster recovery plans your firm establishes.”

**tips
from the pros**



Disaster Recovery Plans

- “For emergencies occurring during business hours, the first priority is personal safety. Create an emergency plan that includes evacuation procedures, what to take (if time) and who is responsible for what.
- Run periodic drills and ensure everyone is familiar with their roles. Knowing what to do in an emergency can help control actions and emotions long enough to escape safely.
- Each person should have at his/her workstation: bag with comfortable shoes, water, copy of emergency plan. At least one emergency bag per area should keep a first aid kit. Every person should keep with them at all times: fully charged cell phone, cash in small bills, full tank of gas in car, list of phone numbers, medications.
- Have an out-of-state point person to route messages among family, friends and associates.
- Keep a copy of the emergency plan and related documents (e.g., phone numbers, maps) at home in case an emergency occurs during non-business hours.
- Back up computer files and store them offsite. Take into consideration what data is backed up. Is it only financial data? Have a plan to back up other data, such as work in progress, databases, etc., regularly as well.
- Update your plan on a regular basis to account for changes in people and systems.
- Expect that even with the best planning, not everything will run as smoothly as you would like it to. Power, phones, transportation and delivery systems may be down longer than anyone anticipates.”

**tips
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Contributors

Ms. Jane N. Abitanta
President/Principal
PERCEVAL ASSOCIATES, INC.
2472 Broadway
Suite 315
New York, NY 10025
212-579-0207
j.abitanta@percevalassociates.com

Ms. Cindy Anderson
Senior Human Resources Generalist
PRINCIPAL CAPITAL
801 Grand Avenue
Des Moines, Iowa 50392-0490
anderson.cindy@principal.com

Ms. Beverly Bergman
Institutional Marketing Assistant
NICHOLAS-APPLEGATE CAPITAL
MANAGEMENT
600 W. Broadway
Suite 3100
San Diego, CA 92101-3579
619-687-2827
beverly_bergman@nacm.com

Ms. Cara Crosetti
Assistant Vice President
CAPITAL GUARDIAN TRUST CO.
333 S. Hope Street
51st Floor
Los Angeles, CA 90071
213-486-9057
Cara_crosetti@capgroup.com

Ms. Dana Dakin
Managing Director
DAKIN PARTNERS
The Old Firehouse
Box 15 - Campground Road
Wilmot Flat, NH 03287
603-526-4366
info@dakinpartners.com

Ms. Kay Fleming
Assistant Vice President
DEUTSCHE ASSET
MANAGEMENT
130 Liberty Street, NYC02-1704
New York, NY 10006
212-250-5441
kay.fleming@db.com

Ms. Jenny L. Herring
Vice President, Marketing
Communications
PRINCIPAL CAPITAL
801 Grand Avenue
Des Moines, Iowa 50392-0490
515-283-8847
herring.jenny@principal.com

Ms. Sally Stalcup
Director of Research
CHARNLEY & RØSTVOLD, INC.
34085 Pacific Coast Highway
Suite 206
Dana Point, CA 92629
949-487-3500
c-r@pacbell.net

Ms. Susan Leader
TCW GROUP
200 Park Avenue
New York, NY 10166
212-771-4518
leaders@tcw.group

Mr. John Maschoff
Senior Vice President/Client Service
and Marketing
PEREGRINE CAPITAL
MANAGEMENT
800 LaSalle Avenue
Suite 1850
Minneapolis, MN 55402-2018
612-343-7639
john.maschoff@peregrinecapital.com

Mr. Keith McDowell
Principal
MCDOWELL CONSULTING
5 Great Valley Parkway
Suite 257
Malvern, PA 19355
610-648-3911
keith@mcdowellconsulting.com

Mr. Frank P.L. Minard
President
INVESTORFORCE, INC.
140 West 57th Street
Suite 11A
New York, NY 10019
212-247-8370
fminard@investorforce.com

Ms. Chela Mitchell
Sales Communication Manager
FRANK RUSSELL COMPANY
P.O. Box 1616
909 A Street
Tacoma, WA 98402-5120
800-426-7969
cmitchell@russell.com

Mr. James Moyer
DEUTSCHE ASSET
MANAGEMENT
130 Liberty Street, NYC02-1704
New York, NY 10006
212-250-4709
james.moyer@db.com

Ms. Sheila J. Olson
Head of Marketing & Communications
WELLS CAPITAL
N9305-092
6th Marquette
Minneapolis, MN 55479
612-316-3422
sheila.j.olson@wellscap.com

Contributors

Mr. Ryan Ortuño
CHARNLEY & RØSTVOLD, INC.
34085 Pacific Coast Highway
Suite 206
Dana Point, CA 92629
949-487-3500
c-r@pacbell.net

Ms. Jennifer M. Pedigo, CFA
Managing Director-Institutional
Marketing and Client Service
PRINCIPAL CAPITAL
801 Grand Avenue
Des Moines, Iowa 50392-0490
515-247-7857
pedigo.jennifer@principal.com

Ms. Rickie Perrone
rickieperrone@hotmail.com

Ms. Jill Bourgeois Plumb
Assistant Vice President
CAPITAL GUARDIAN TRUST
COMPANY
333 South Hope Street
51st Floor
Los Angeles, CA 90071
213-486-9659
jmbp@capgroup.com

Christine M. Røstvold
President
CHARNLEY & RØSTVOLD, INC.
34085 Pacific Coast Highway
Suite 206
Dana Point, CA 92629
949-487-3500
c-r@pacbell.net

Ms. Jillian Rudman
J RUDMAN & ASSOCIATES
165 Marguerite Avenue
Mill Valley, CA 94941
415-383-3434
jillian@jrudman.com

Mr. John H. Seiter
Executive Vice President
CAPITAL GUARDIAN TRUST COMPANY
333 South Hope Street
50th Floor
Los Angeles, CA 90071
213-486-9436
jhs@capgroup.com

Ms. Kerry A. Shanley
Vice President, Consultant Relations
JENNISON ASSOCIATES LLC
466 Lexington Avenue, 19th Floor
New York, NY 10017
212-833-0443
kshanley@jennison.com

Ms. Linda Sherman
CHARNLEY & RØSTVOLD, INC.
34085 Pacific Coast Highway
Suite 206
Dana Point, CA 92629
949-487-3500
c-r@pacbell.net

Mr. Gregg J. Smolenski
Vice President, Institutional Sales
and Client Services
CHICAGO CAPITAL MANAGEMENT
6000 Fairview Road
12th Floor
Charlotte, NC 28210
704-552-3617
greggsmo@yahoo.com

Mr. Richard Wiener
Client Relations - Vice President
TRUST COMPANY OF THE WEST
865 South Figueroa Street
Suite 1800
Los Angeles, CA 90017
213-244-0251
wiener@tcwgroup.com