

AGENDA

LEADERSHIP STUDY GROUP: SPRING TUNE UP

April 8-9, 2019

Ferrington House Inn, Chapel Hill

Dress Code: Business Casual

Tuesday, April 9

7:30am-9:00am	Breakfast	Ferrington House Inn
9:00am	Presentation of Awards to Bracket Winners: Peter Bielan and Tim Kehrer	The Barn
9:15am	On Madness and Metrics – What Filling Out the Bracket Teaches Us About Managing with Metrics: Tim Kehrer Participants describe about how they combine metrics and experience, and whether they need new metrics for the New Era	
9:45am	Second Story Advisors: Peter Bielan and Arthur Osman Latest research on best practices in weaning advisors from referrals	
10:15am	Revisiting the Value of an Investment Program to a Financial Institution: Tim Kehrer Back by popular demand, our classic study is being updated with fresh data. This presentation will focus on: <ul style="list-style-type: none">• Why do financial institutions believe that adding banking services increases loyalty?• Does creating an investment relationship with a banking client create more loyalty, or does greater loyalty result in an investment relationship?	
10:45am	Break	
11:00am	Best Practices in Sales Manager Compensation: Peter Bielan	
11:45am	Upcoming Initiatives at Kehrer Bielan Research & Consulting Surveys, research, and study groups	
12:00pm	Wrap up and Lunch	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.

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