



Making Connections, Addressing Concerns, Creating Solutions

In a fast-paced business environment, it pays to respond with agility, innovation, and a forward-thinking mindset. The current environment — with its unique physical, economic, and regulatory concerns — only serves to magnify the need for financial services companies to pivot quickly and effectively in response to ongoing change. When I accepted my new role as corporate vice president of sales and member relations for LL Global in 2020, I found myself reaching out to our member companies — not only to bring myself up to speed on their needs and concerns, but also to envision how our organization could grow in response to those needs.

What I hear almost universally from the industry is that while firms continue to adjust to this new normal, they also anticipate ongoing concerns. These include (among others) the ability to stay connected with clients, how to price products in a low-interest-rate environment, and how to maintain or improve productivity with a workforce that may — to some extent — remain remote. It has been fascinating to discover and share how the resources and tools we offer can help address these concerns.

Part of LL Global's mission statement includes empowering our members with "knowledge, insights, connections, and solutions." My position in the organization allows me to drive this effort — as I reach out to discover how we can become more member-centric. In order for our association to define problems and offer solutions that address member concerns, we need to make connections — as individuals, through research, committees/study groups, and conferences.

While a direct consultative approach can help your company to address a specific concern, working together means we realize opportunities and build industrywide solutions. As more people connect and openly discuss their concerns (and successes), we, in turn, can use that intelligence to drive new research, create new solutions, and offer new

education opportunities. One example of this exists in our recent response to the remote work environment. We now offer a tool to help determine which employees have the skills to thrive virtually, provide employees' perspective on their virtual work environment, and help leaders recognize and improve virtual workforce management.

What does this striving toward connection and communication mean on a practical level? It means your company can:

- Utilize our research not only to inform about overall trends, but also to react to a situation specific to your company.
- Take advantage of consultative/custom research specific to your firm or consortia of firms to uncover even more in-depth data.
- Encourage future leaders to further their education, earn a designation, attend a virtual conference, or participate in a committee.
- Contribute to our ongoing creation of tools and solutions to meet your needs.

On the flip side, my team and I can inform you by analyzing and utilizing the data we have, as we discover where and how our engagement works. Encouraging you to take full advantage of your membership may mean we direct you toward areas that you did not even know existed.

That is my directive for the months ahead in 2021 — communicating, engaging, and connecting members with the people, the information, and the insights to help make long-term business decisions. I am passionate about our member experience. Throughout my career, I have focused on developing new processes, building teams, and leveraging data to enhance the client experience while improving business results. I intend to continue that focus in my role at LL Global. I look forward to serving you as we move forward during this pivotal time for our industry. 🌐