

DAY 1

TUESDAY, NOVEMBER 10

### Defining data governance and ownership

Best practices discussion on ensuring your data governance strategy is embraced across the entire investment management enterprise. We share successful tricks to getting users on board and arriving at agreed upon definitions. We will walk through case studies of data governance implementation, the challenges and opportunities of embedding the strategy, maintaining ongoing maintenance and improvements and peer networking.

**4:00pm** Welcome comments

**Stina Dakers**, Head of Programming, NAREIM

**4:05pm** Live attendee polling

- *How to quantify the time leakage and related cost of data manipulation.*

**4:15pm** Case study review: Roadmap strategies

**Mike Goodwin**, Director of Technology, Stockbridge  
**Adele Pugliese**, Vice President, Data Governance, BentallGreenOak

**4:40pm** Peer-to-peer conversations: Breakout group

- *Does your firm has a formalize data governance plan?*
- *Where are you in the evolution of your data governance?*
- *Who owns governance at your firm?*
- *What have been the lessons learned or change in your approach compared to previous failed attempts?*
- *How do you handle change management across your team?*

**5:00pm** Feedback session

- *Breakout group leaders take notes and report back to the whole room on their key takeaways.*

**5:20pm** Peer networking 

Welcome commel  
 Format: Small group breakouts, randomly rotated.

DAY 2

THURSDAY, NOVEMBER 12

### Data analysis. Improving automation and integration

Real estate is a complex and nuanced asset class and the industry regularly speaks about the skills that asset and portfolio management and acquisitions professionals need today to fully utilize the power of the data in their firms. But what skills do the tech and business support teams need and is it enough? Is there a skills gap when it comes to third-party advisors and in-house personnel? Do you need a department, rather than a project?

#### 4:00pm Welcome comments

**Stina Dakers**, Head of Programming, NAREIM

**NAREIM leader: Daryl Pitts**, Senior Vice President, Pereview Software

#### 4:10pm How to quantify the time leakage and related cost of data manipulation

**Moderator: Jim Valente**, Global Head of Data Services, RealFoundations

- *Discuss polling results with whole room discussion.*

#### 4:30pm Case study review: Successful tactics and proof of concepts to win over your c-suite

**Jeff Wilson**, CEO, Saxony Partners

**Matt Gilbert**, Senior Director, Performance Analytics, Nuveen

#### 5:00pm Presentation — Leveraging RPA to create efficiencies

**Josh Malinoff**, Principal, Redirect Consulting

**Jason Schedler**, Director-Process Automation, Redirect Consulting

- *Learn about how Robotic Process Automation can streamline processes within a real estate investment management firm.*
- *See a case study of automating the distribution/contribution process, creating efficiencies, faster delivery, reduction in error and a better adherence to process and policy.*

#### 5:20pm Peer networking

Welcome comments

*Format: Small group breakouts, randomly rotated.*