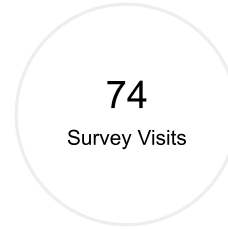




23
Total Responses

23 Completed Responses

0 Partial Responses

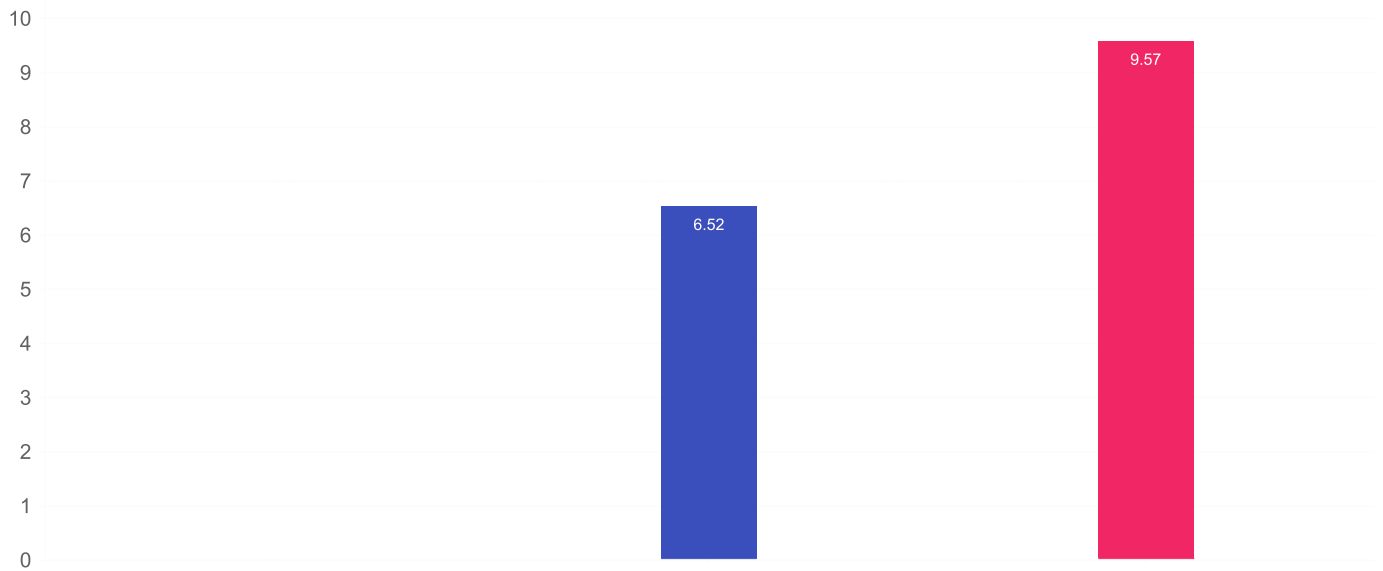


74
Survey Visits

Show All ▾

Special Statistics

Overall CSAT Score



How would you rate the relevance of the subject matter that was discussed relative to your objectives or challenges as a CEO?

Getting more specific, would you kindly rate the discussion on each major agenda topic on whether it was of interest and relevant

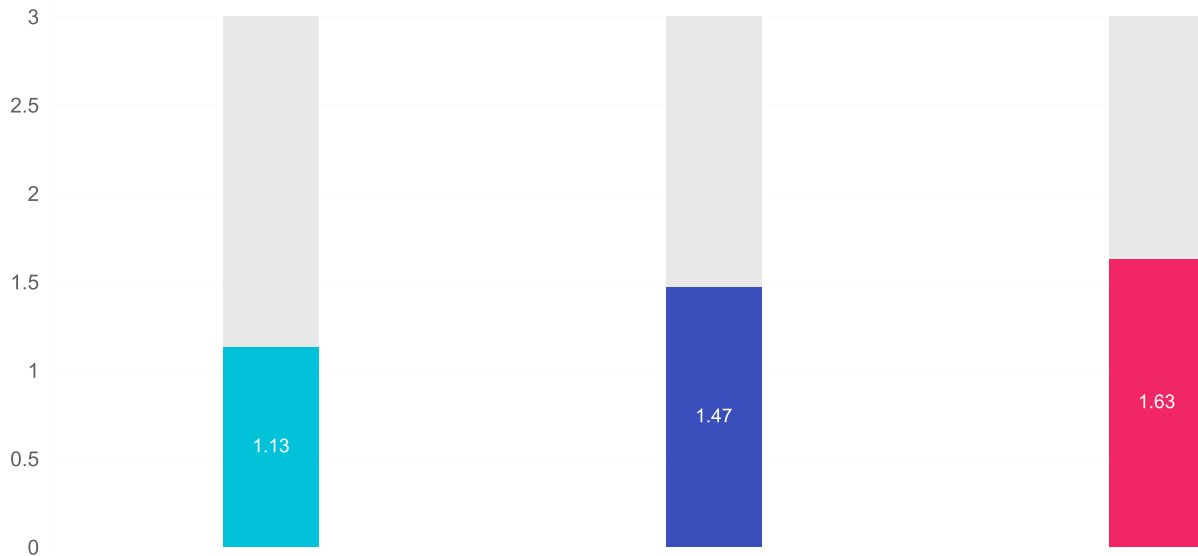
Based on your small group readouts, we compiled the action plan delineated below. Can you rate each element of the action plan in terms of relative importance? If we missed anything or you would like to add a comment, please feel free to do so in the comment box.

Questions	Negatives	Neutrals	Positives	CSAT Score
How would you rate the relevance of the subject matter that was discussed relative to your objectives or	20	3	0	0.00

CEO Seminar with 19 responses.	SUMMARY OF RESPONSES	137	INDIVIDUAL RESPONSES	78	15	6.52
<p>Getting more specific, would you kindly rate the discussion on each major agenda topic on whether it was of interest and relevant</p> <p>Based on your small group readouts, we compiled the action plan delineated below. Can you rate each element of the action plan in terms of relative importance? If we missed anything or you would like to add a comment, please feel free to do so in the comment box.</p>		54		50	11	9.57

Overall CSAT Score: 7.07

Average Ratings



How would you rate the relevance of the subject matter that was discussed relative to your objectives or challenges as a CEO?

Getting more specific, would you kindly rate the discussion on each major agenda topic on whether it was of interest and relevant

Based on your small group readouts, we compiled the action plan delineated below. Can you rate each element of the action plan in terms of relative importance? If we missed anything or you would like to add a comment, please feel free to do so in the comment box.

Questions	Average Ratings	Out of
How would you rate the relevance of the subject matter that was discussed relative to your objectives or challenges as a CEO?	1.13	3
Getting more specific, would you kindly rate the discussion on each major agenda topic on whether it was of interest and relevant	1.47	3
Based on your small group readouts, we compiled the action plan delineated below. Can you rate each element of the action plan in terms of relative importance? If we missed anything or you would like to add a comment,	1.63	3

please feel free to do so in the comment box.

CEO Seminar with 19 responses.

SUMMARY OF RESPONSES

INDIVIDUAL RESPONSES

Overall average survey rating: 4.99/10

Page 1

Xponance CEO Seminar

Q1

First Name, Last Name

Answered: 23 Skipped: 0

Field label	Response percent	Response count
First Name	100.00%	23 Responses
Last Name	100.00%	23 Responses

Q2

Email Address:

Answered: 23 Skipped: 0

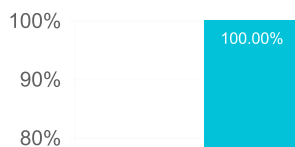
Show 23 responses

Q3

We appreciate that we are all busy people. Was the seminar worth the two days that you dedicated to it?

Answered: 23 Skipped: 0

Default



60%
50%
40%
30%
20%
10%
0%



Yes, and I would attend again

Yes, but not sure I would attend again

Possibly, with some changes

No

Choices	Response percent	Response count
Yes, and I would attend again	100.00%	23
Yes, but not sure I would attend again	0.00%	0
Possibly, with some changes	0.00%	0
No	0.00%	0
Any additional comments? 10 responses		10

Q4

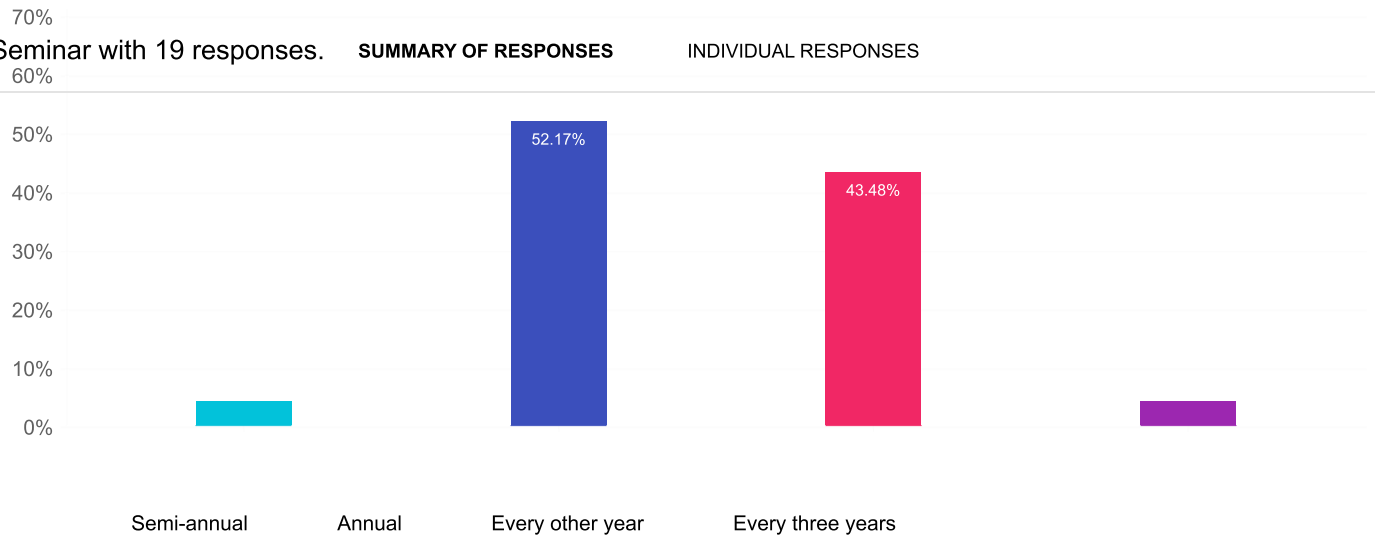
If you answered yes and would attend again, what do you think the right cadence for the CEO seminar should be?

Answered: 23 Skipped: 0

Default

100%
90%
80%

CEO Seminar with 19 responses. **SUMMARY OF RESPONSES** INDIVIDUAL RESPONSES

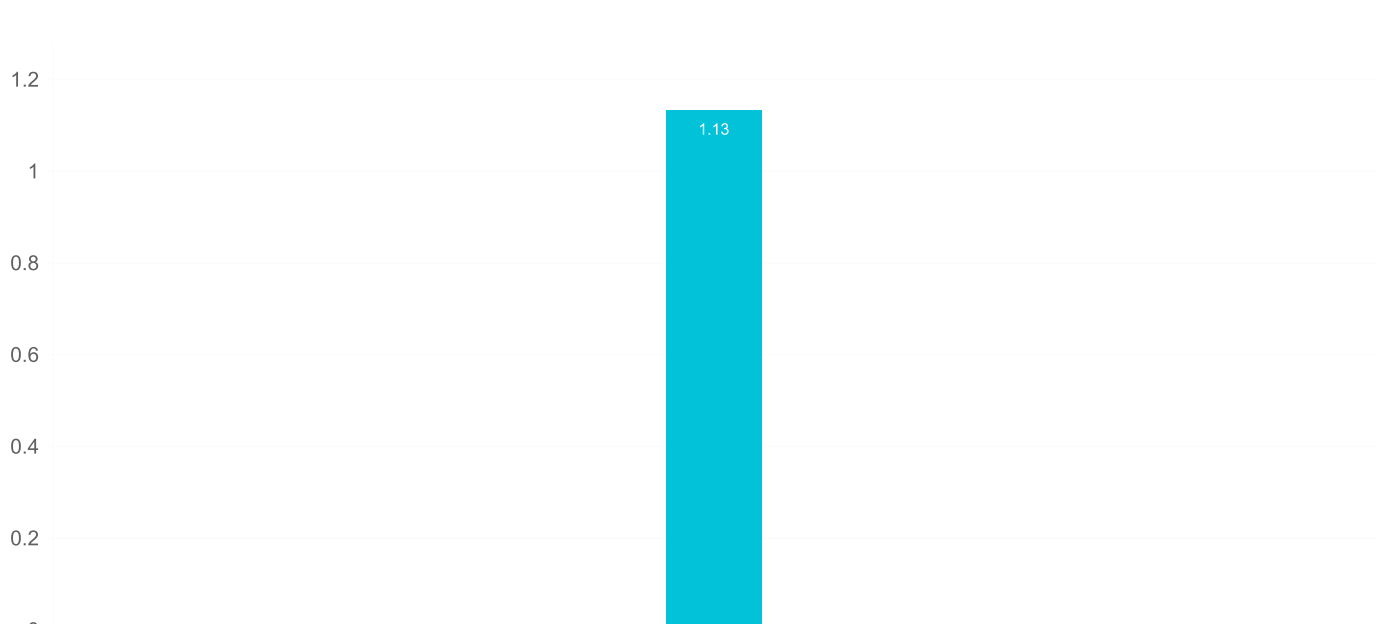


Choices	Response percent	Response count
Semi-annual	4.35%	1
Annual	52.17%	12
Every other year	43.48%	10
Every three years	4.35%	1

Q5

How would you rate the relevance of the subject matter that was discussed relative to your objectives or challenges as a CEO?

Answered: 23 Skipped: 0



Average Rating

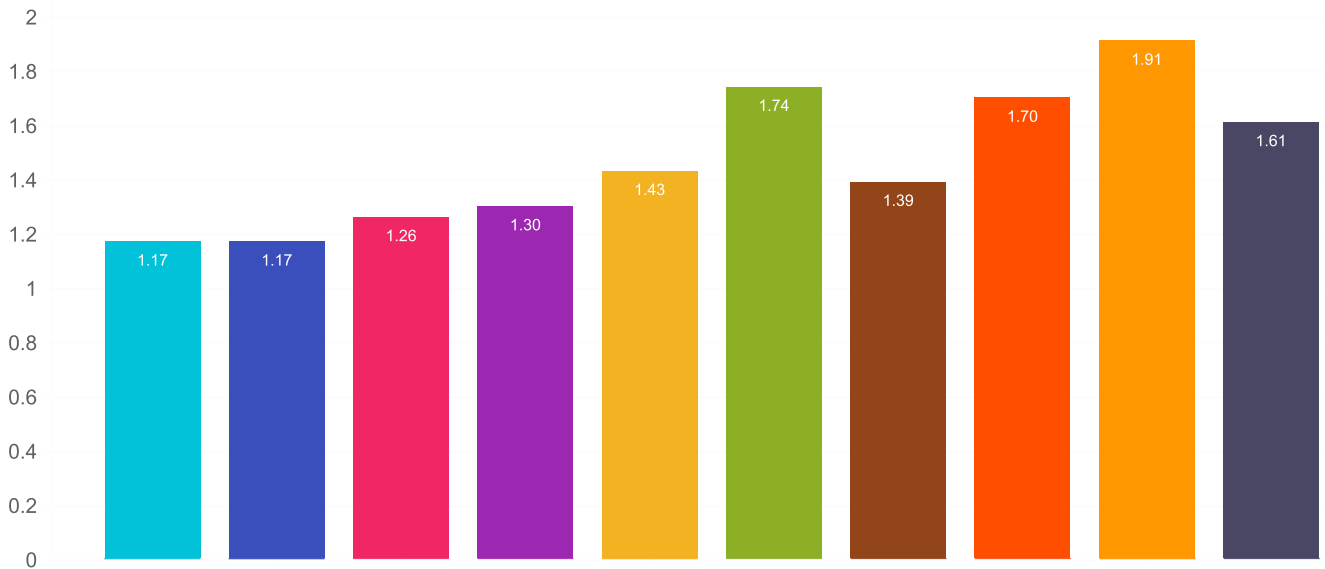
Rating	Response percent	Response count
1 (Very Relevant)	86.96%	20
2	13.04%	3
3 (Irrelevant)	0.00%	0

Average rating: 1.13

Q6

Getting more specific, would you kindly rate the discussion on each major agenda topic on whether it was of interest and relevant

Answered: 23 Skipped: 0



Navigating the different life stages of your firm

Scaling while keeping focus

Building your brand and obtaining distribution shelf space

Building a diverse bench and keeping your team motivated

Sharing economics to encourage engagement while compensating founder risk

Succession planning

Controlling data and data analysis expenses

Inhouse or outsourced compliance?

Incorporating ESG

Incorporating geopolitical risk

Row	1 (Of Interest and Relevant)	2	3 (Not relevant to me or my firm)	Average rating	Response count
Navigating the different life stages of your firm	82.61% (19)	17.39% (4)	0.00% (0)	1.17	23
Scaling while keeping focus	82.61% (19)	17.39% (4)	0.00% (0)	1.17	23
Building your brand and obtaining distribution shelf space	73.91% (17)	26.09% (6)	0.00% (0)	1.26	23
Building a diverse bench and keeping your team motivated	69.57% (16)	30.43% (7)	0.00% (0)	1.30	23
Sharing economics to encourage engagement while compensating founder risk	60.87% (14)	34.78% (8)	4.35% (1)	1.43	23
Succession planning	43.48% (10)	39.13% (9)	17.39% (4)	1.74	23
Controlling data and data analysis expenses	65.22% (15)	30.43% (7)	4.35% (1)	1.39	23
Inhouse or outsourced compliance?	39.13% (9)	52.17% (12)	8.70% (2)	1.70	23
Incorporating ESG	30.43% (7)	47.83% (11)	21.74% (5)	1.91	23
Incorporating geopolitical risk	47.83% (11)	43.48% (10)	8.70% (2)	1.61	23
What topic should have been incorporated? 11 responses					11

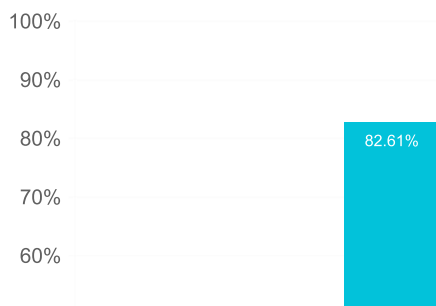
Average rating: 1.47

Q7

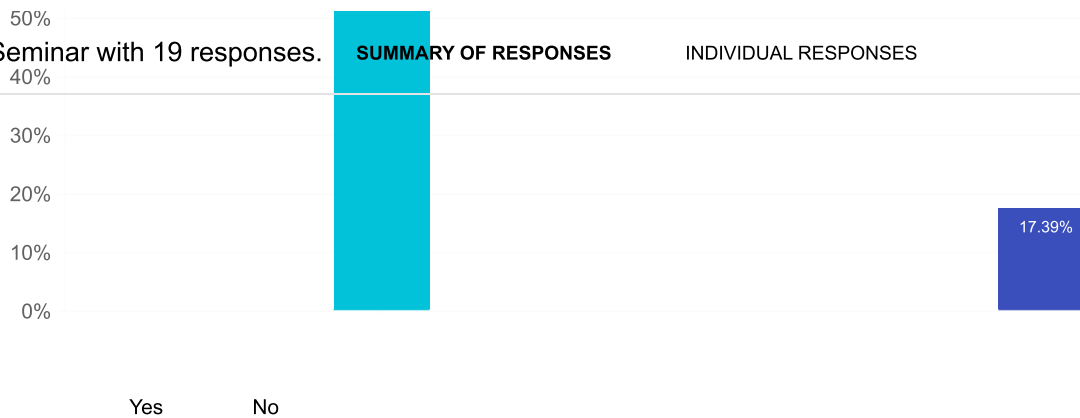
Did we strike the right balance between content presentation and CEO to CEO interaction?

Answered: 23 Skipped: 0

Default



CEO Seminar with 19 responses. **SUMMARY OF RESPONSES** INDIVIDUAL RESPONSES



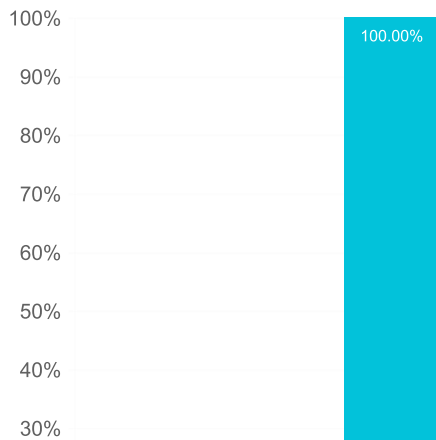
Choices	Response percent	Response count
Yes	82.61%	19
No	17.39%	4
If you answered no, how would you change it? 13 responses		13

Q8

The seminar was designed to create a "safe" space under "Chatham House Rules" for transparent discussions and idea sharing on the challenges that you may be facing as CEO's. Consequently, except for the dinner at the end of day one, we limited the attendees to the CEOs of funded managers. Would you change the make-up of the seminar and if so, how would you preserve the transparency that we are trying to achieve?

Answered: 23 Skipped: 0

Default



10%

0%

4.35%

I like the makeup of the last CEO Seminar. Please keep the same

Change the makeup. Please elaborate in the comment section on what type of person (clients, analysts) you would include and how would you preserve the desired transparency on challenges and leadership strategy if they were included

Choices	Response percent	Response count
I like the makeup of the last CEO Seminar. Please keep the same	100.00%	23
Change the makeup. Please elaborate in the comment section on what type of person (clients, analysts) you would include and how would you preserve the desired transparency on challenges and leadership strategy if they were included	4.35%	1
Here's how I would change the makeup 7 responses		7

Q9

Are there are any other format (as opposed to subject matter) changes that you would like to suggest?

Answered: 12 Skipped: 11

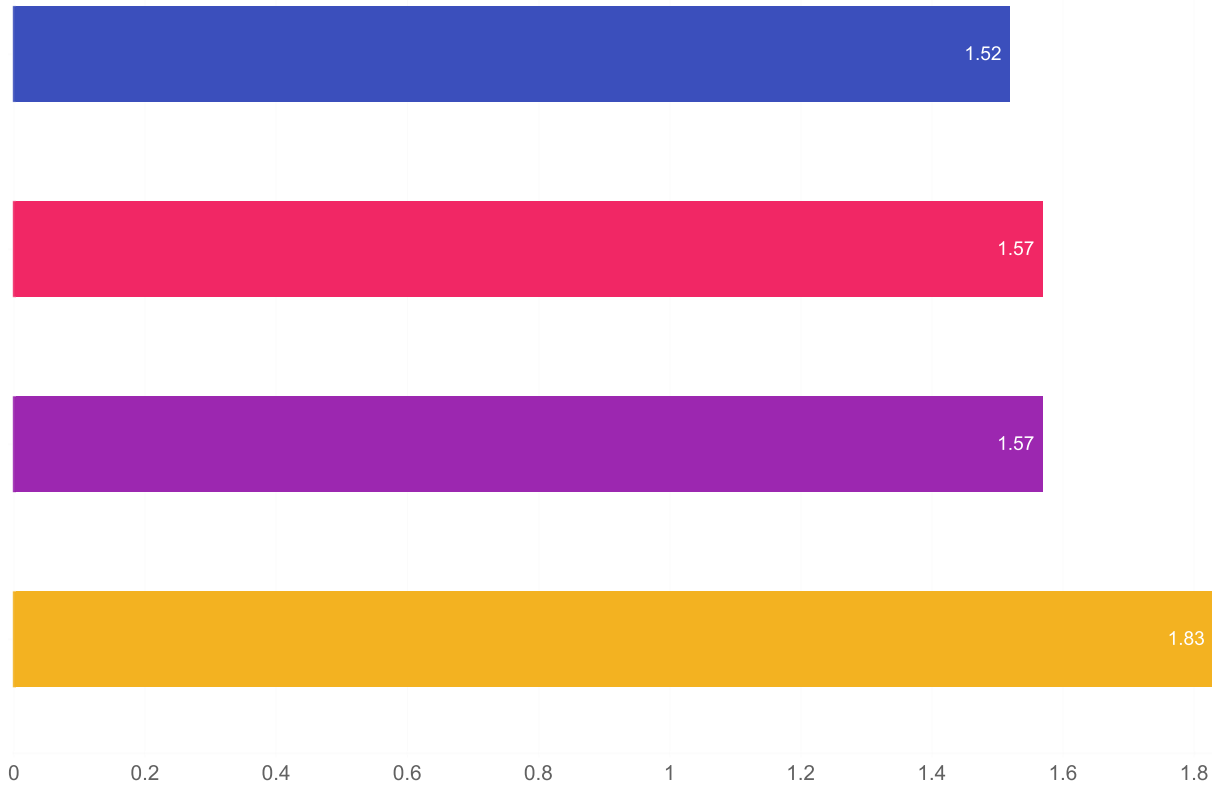
Responses

Show 12 responses

Q10

Based on your small group readouts, we compiled the action plan delineated below. Can you rate each element of the action plan in terms of relative importance? If we missed anything or you would like to add a comment, please feel free to do so in the comment box.

Answered: 23 Skipped: 0



Create a forum (Slack or LinkedIn etc.) exclusive to Xponance and attendees

Distribute brief manager profiles and best contact info etc.

Explore more granular alternatives to MSCI benchmarks and engage Asset owners and consultants to consider more flexible benchmark specifications in IMA's

Xponance would feature an emerging manager each month on social media and on our website

Xponance would explore creating a shared services company or cooperative to provide back and middle office services to emerging managers

Row	1 (Very important)	2	3 (Not important)	Average rating	Response count
Create a forum (Slack or LinkedIn etc.) exclusive to Xponance and attendees	47.83% (11)	39.13% (9)	13.04% (3)	1.65	23
Distribute brief manager profiles and best contact info etc.	47.83% (11)	52.17% (12)	0.00% (0)	1.52	23
Explore more granular alternatives to MSCI benchmarks and engage Asset owners and consultants to consider more flexible benchmark specifications in IMA's	56.52% (13)	30.43% (7)	13.04% (3)	1.57	23
Xponance would feature an emerging manager each month on social media and on our website	43.48% (10)	56.52% (13)	0.00% (0)	1.57	23
Xponance would explore creating a shared services company or cooperative to provide back and middle office services to emerging managers	39.13% (9)	39.13% (9)	21.74% (5)	1.83	23
Any additional comments? 11 responses					11

Average rating: 1.00

CEO Seminar with 19 responses.

SUMMARY OF RESPONSES

INDIVIDUAL RESPONSES
