

Accomplish's objectives for 2020

Broaden and deepen our benchmarking to further increase its value to participating firms

- Double the number of firms in the EMEA Institutional CX Maturity Benchmark, creating a 'groundswell' in pursuit of putting the 'serve' back in financial services
- Enrich the data gathering process and make it easier for you to perform and refresh your self-assessments
- Deepen our data analytics in search of cause-and-effect relationships
- Strengthen your benchmarking reports
- Broaden our ability to serve your needs with two new benchmarks for member firms – most likely to be Global Institutional and EMEA Wholesale

Establish the CX Forum as the force behind extending the leading edge of CX in asset management

- Complete an ambitious plan of R&D as a high-quality low-cost way for you to discover how to solve what we now know are the industry's biggest CX-related issues
- Establish the planned 'touchpoint survey' [R&D Project #4] as the basis for a recurring industry event that will engage your clients to understand the impact of CX on their buying decisions, their definition of success and failure, and the touchpoints where they are being under- or over-served.
- Create new opportunities for you to meet and interact with your peers on CX, find areas of common ground, and share lessons learned
- Enable you to interact virtually with and gain insights from each other at any time
- Commence a series of 'art of the possible' events for you to learn lessons from other industries – how to discuss CX with your colleagues, how to get the basics right and connect them, and how to maintain extraordinary CX and avoid complacency
- Reward the early birds

"Good CX is forgettable. Extraordinary CX (good or bad) is remembered, discussed, and shared." Hague and Hague, 2018.



Purpose-built through research



Command of the latest data



Relevant. Brief. Gone.

