

Accomplish

Research and Development

A man with a beard and glasses, wearing white headphones, is sitting at a desk in a well-lit office. He is looking at a computer monitor and typing on a keyboard. The background shows a window with a view of a city. The overall atmosphere is professional and focused.

CX Fundamentals Training Course

The problem with the industry status quo

Historically, the asset management industry has not been aligned on what CX is, why it is imperative, and how it works

Early movers are already using CX to secure competitive advantage

- This is a problem because:
 - To gain a competitive advantage from CX an asset manager must first be able to define, prioritise and measure it.
 - If an organisation cannot align internally on these fundamental points, it will struggle to recognise and fully secure the competitive advantages from CX.
- It is especially the case in the B2B context.



Improved productivity

- ✓ Greater satisfaction retains revenue
- ✓ Greater organic growth
- ✓ Efficient prospecting supported by advocacy



Optimised operational costs

- ✓ Minimised complexity
- ✓ Unnecessary costs eliminated
- ✓ Lower operational risk

To solve the problem, organisations need to align internally on the importance of CX, on what good CX looks like, and on how to become client-led

CX Training creates alignment

Different courses to meet your needs

CX Fundamentals May 2020



Building Blocks of CX H2 2020



Specialist topics From H2 2020

Key individuals can master high-value topics:

- Best practice client segmentation
- Listening to the voice of the client
- Attracting, developing & retaining CX talent
- Post-M&A CX

CX Fundamentals – gives teams, departments, and entire organisations the knowledge and understanding of CX they need, as well as the ability to apply it:

- Align internally on the importance of CX, on what good CX looks like, and on how to become client-led
- Set informed, meaningful and consistent CX-related annual objectives as part of and by the end of the course
- Be able to compare the progress of your CX transformation against my peers using industry CX benchmarks

Building blocks of CX – designed for CX specialists who want to improve their firm’s CX maturity by analysing the detailed components of CX so they can synthesise them into new solutions for their organisation:

- Drill down into the detail of ‘what good CX looks like’
- Taking each ‘Building Block of CX’ in turn, explore practical examples of how firms can strengthen their CX maturity
- Ensure your CX initiative embeds a holistic CX capability into BAU

Purpose-built for the B2B asset management industry

CX Fundamentals Course

CX Fundamentals gives staff the knowledge and understanding of CX they need, as well as the ability to apply it

1

Align internally on the importance of CX, on what good CX looks like, and on how to become client-led

2

Master the fundamentals of CX:

- What is CX, and the asset management client journey?
- Why CX? And why now?
- How CX works
- How B2B CX is different to B2C
- What good CX looks like

3

Set informed, meaningful and consistent CX-related annual objectives as part of and by the end of the course



Compatible with industry CX benchmarks

Is this the CX training course for you?

What do you want to achieve?	Package	Price	Notes
Become a client-led team	1. Up to 6 users on www.accomplish.world	£ 3,570	Free for CX Forum premium members. Unit price = £595
Evolve into a client-led department	2. Up to 20 users on www.accomplish.world	£ 9,900	Unit price = £495
	3. Up to 50 users on www.accomplish.world	£ 19,750	Unit price = £395
Transform into a client-led business unit	4. One-year licence to run CX Fundamentals on your own systems.	£ 49,000	
Go all the way and facilitate client centricity across all touchpoints on your end-to-end client journey	5. Three-year licence to run CX Fundamentals on your own systems.	£ 117,000	Payable in thirds over 3 years. Ability to shape and evolve the course.

Take a test drive with a free lesson on 'why asset management CX'.
And check out our [blogs on the fundamentals of CX](#) to see how we roll.



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