

Accomplish



CX Fundamentals



CX has become THE differentiator

Exploit it, or don't be surprised

Bargaining power has shifted to clients

Unreliable differentiators

- Product performance
 - Pricing
 - Brand
- Headwinds*
- X Market over-supply*
 - X Price-taking*
 - X External events*

Reliable differentiators

- Client experience
- Tailwinds*

- X Controllable*
- X Commercial*
- X Incremental*

Your clients are consumers in the B2C economy



This is driving demand for CX from your B2B asset management firm

CX is an 'effect' you 'cause'



CX is an overall impression

- It is your client's overall impression of you
- It informs their decisions to buy, stay, and consume more of your services
- It is personal, subjective, open to influence, subject to change ... and it can be **irrational**

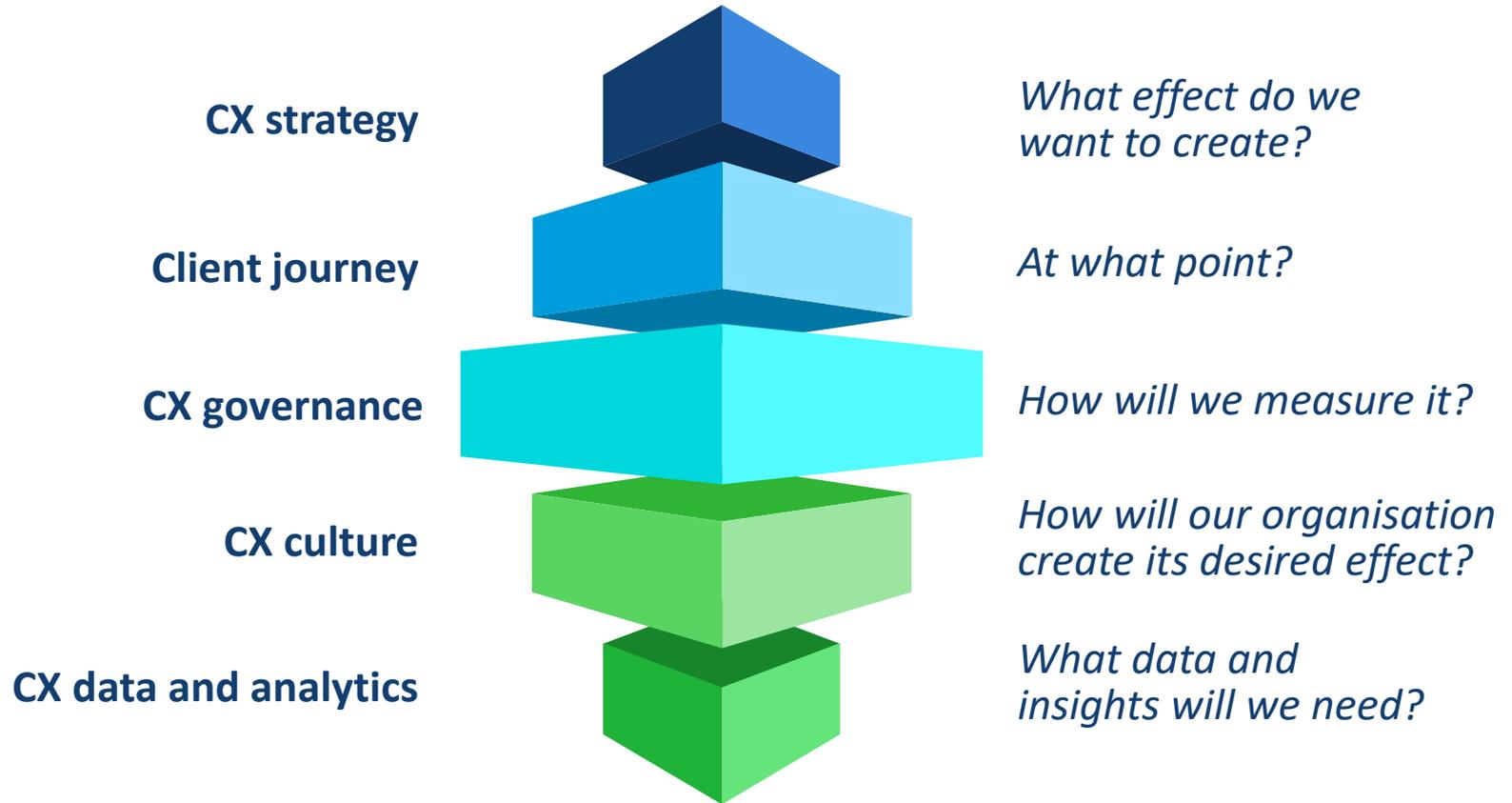
It is an **effect** in a client that a supplier **causes**, and it is observable and measurable

Every direct and indirect interaction is in-scope

- From the moment a prospect becomes aware of you
- Through selection and onboarding
- To every post-sale interaction until offboarding when the client becomes a prospect again

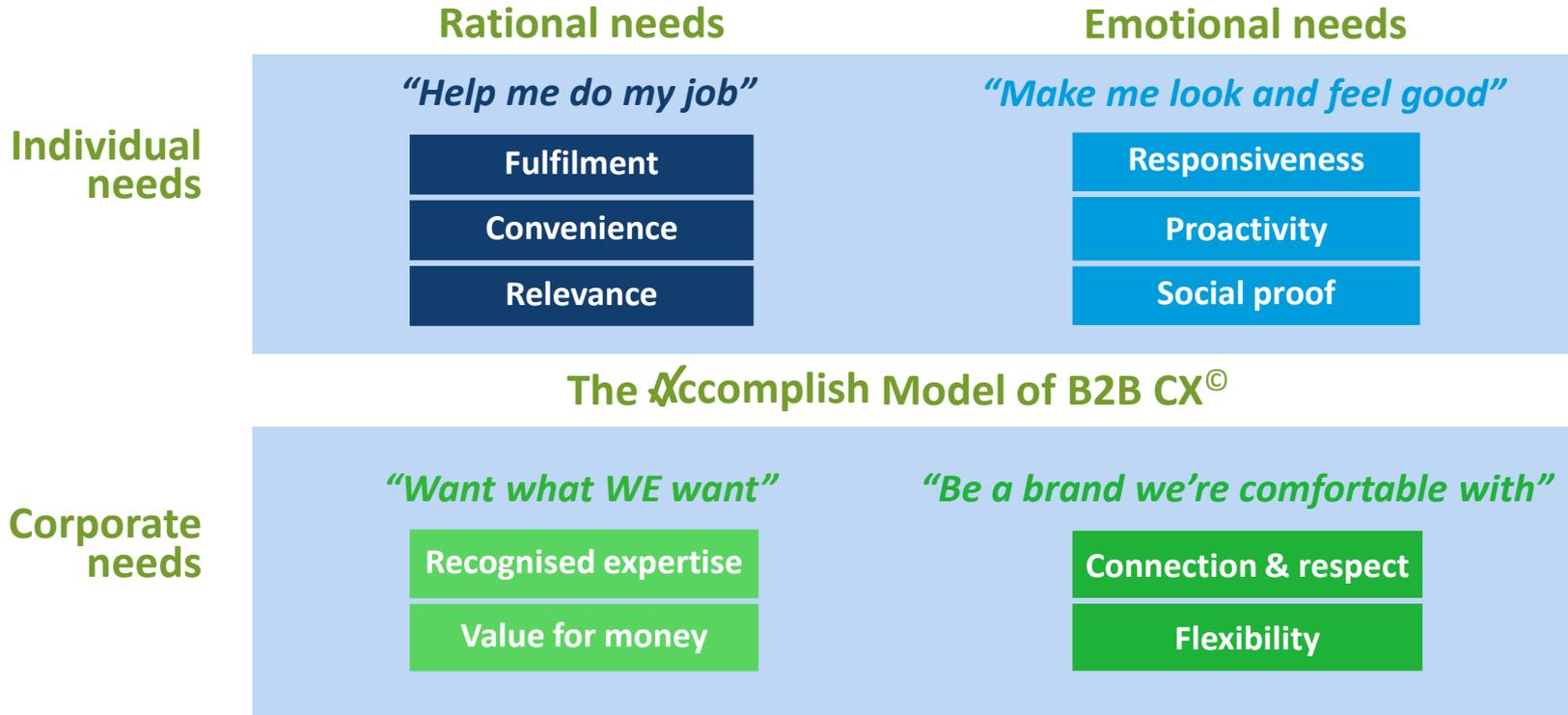
**CX is for everyone on the client journey
Not just the client-facing staff**

The Building Blocks of CX[©]



What effect do you want to create?

A timeless and transferable model of measurable effects



Tools for B2C transactions do not necessarily apply to B2B relationships

Be extraordinary or be forgotten



Your alignment with what your clients want will drive their impression of your value.⁵



Clients judge your expertise in the areas they do not understand by your performance in those they do.



We cannot follow rational decision-making processes in extraordinary situations.



As a result, emotions caused by extraordinary events disproportionately skew our memories.



Extraordinary experiences get:

- Remembered
- Shared
- Discussed



Good experiences are ordinary and we forget them



Want what your clients want ... and be extraordinary, or be forgotten

Your effect on clients is observable in what they do and what they say

A much-needed behavioural benchmark

Operational /
service
performance

'Cause'



'Effect'

What
clients say

Client behavior

- Browsing, giving time, listening.
- Buying.
- Service consumption rates and staying connected.
- Staying – remaining a client.
- Buying more – additional products.

Client feedback

- Client satisfaction data
- Industry client surveys
- Net promoter scores

Client behavior is the reliable indicator of demand

Humans are tricky creatures

On its own, what clients say (feedback) will contain gaps and inaccuracies ^{1,2,3,4}

- X They are inundated with requests, leading to low response rates.
- X The words of a few may not be representative of all.
- X At its heart, it is low-resolution data and can be analogue.
- X Infrequency creates lag times and reduces its effectiveness.
- X Humans forget less recent events.
- X We avoid difficult conversations.
- X We can say one thing but do another.



"This way of thinking is transforming our business."
A global head of post-sale service.

Measure what clients do (behavior) to counteract the weaknesses of feedback data

- ✓ Behavior is general and universal, leading to a complete picture.
- ✓ Digitally available in high-resolution.
- ✓ Measurable over any timeframe.
- ✓ Zero client disruption.
- ✓ Unaffected by innate conflict-aversion and memory biases.

Actions speak louder than words

1. FeldmanHall, et al, 2012. What we say and what we do.
2. Tversky and Kahneman, 1974. Judgment under uncertainty.
3. Shafir, Simonson, and Tversky, 1993. Reason-based choice.
4. Cooper, Heron, and Heward, 2020. Applied behavior analysis.

At Accomplish, we manage the asset management Behavioral Benchmark

Vital business intelligence



 Client feedback contains gaps and inaccuracies.

 To counteract this ... measure, compare, and predict their behavior.

 Embed client behaviors into your targets and develop strategies to stimulate the actions you want:

- End-to-end:
 - Strategic and dollarizable behaviors – buying, staying, and buying more.
 - Tactical behavioral indicators.
- 100% quant.
- Institutional. Intermediary.
- Americas. EMEA. Apac.

 Unique business intelligence:

- Clients.
- Markets.
- Competitors.

 An industry-wide collaboration – designed for asset managers by asset managers.

Supply the data and Accomplish will give you insights into their behavior

The Behavioral Benchmark enables previously unavailable capabilities



Strategic use cases

Connect your distribution strategy

- ✓ Identify the conversion stages where you out- and under-perform.
- ✓ Assess the effectiveness of different conversion strategies and ongoing improvements to minimize 'leakage' in your funnel.

Target strategic behaviors

- ✓ Coherent set of metrics that are important for business planning and setting targets.
- ✓ Maximize ROI by focusing on the most valuable metrics.

Make science-based decisions

- ✓ Consistent and comparable external data will help you see your organization from your clients' perspective.

Optimize for behavioral differences

- ✓ Align your business with differences in client behavior across geographic markets and between different client segments.

Early warning that more than pays for itself

- ✓ Measure, compare, and predict your effect on client behavior.
- ✓ Compare what they actually do vs. what they say.
- ✓ Respond rapidly to early warnings of opportunities and threats.

Click to read case studies

Coming soon

Improve your sales conversion

Align your BI with your business strategy

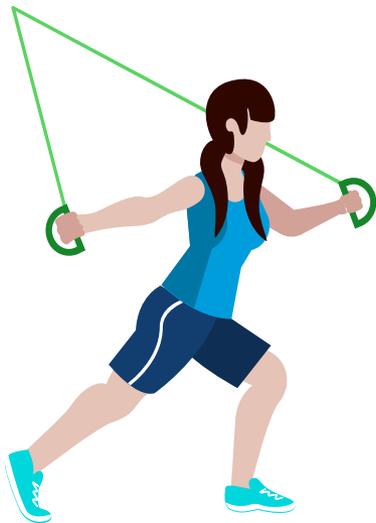
A scientific approach to client tenure

Coming soon

Annual plans now include client behavior targets

Coming soon

Discover your weaknesses BEFORE it's too late



There will be winners and losers



Competitive reasons for CX

- CX is an opportunity to gain a competitive advantage.
- The 'early adopter' firms have already moved, and 68% of CX Forum member firms expected CX to play a more important role in their firms' post COVID-19 strategies ¹ compared to 89% of firms across all industries who see as CX their primary basis for competition. ²
- Yet 75% of B2B asset managers are not ready to seize the opportunity. ^{3,4}



Financial reasons for CX

- A superior CX protects your gross profits by satisfying clients and retaining revenue. ^{5,6,7}
- Extraordinary CX is remembered, discussed and shared ⁸ ... sharing is advocacy, which drives growth. ⁹
- A deliberate, governed and controlled client journey minimises complexity and costs. This defends your net profits. ^{3,7}



Logical reasons for CX

- Emotions create memories, and memories form impressions ¹⁰ – humans do not turn off their emotions when they are at work, so develop memorable experiences that your competitors cannot replicate.
- Survival requires differentiation, and differentiation requires being remembered favourably. If only the extraordinary gets remembered, then be deliberately extraordinary or be forgotten.
- Times have changed – a reputation for superior CX will maintain your firm's ability to attract and retain the best talent which, in turn, will sustain your reputation for superior CX.



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