

Asset management CX benchmarking

Exploit CX

or don't be surprised

Bargaining power has shifted to clients ...
CX has become **THE differentiator**

Unreliable differentiators

- Product performance
- Pricing
- Brand



Headwinds

- X** Market over-supply
- X** Price-taking
- X** External events

Reliable differentiators



Tailwinds

Client experience (CX)

- ✓ Controllable
- ✓ Commercial
- ✓ Incremental

What can you do about it?

Benchmark it



CX Maturity Benchmark

Evaluate

your internal CX capability

Measure, compare, and predict your clients' experience



CX Touchpoint Benchmark



Asset Management CX Forum

Engage

with the industry CX community 



CX is here to stay

Your clients are consumers in the B2C economy.

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

Our focus on benchmarking means we have **no conflict of interest** when we work with clients

Nurturing the future makes us stronger



Accomplish

Purpose-built through research



Command of the latest data



Relevant. Brief. Gone.

