

Asset Management CX Specialists

CX has become *the* differentiator

Unreliable differentiators

- Product performance
 - Pricing
 - Brand
- ✗ Market over-supply
✗ Price-taking
✗ External events



Reliable differentiators

- Client experience (CX)
- ✓ Controllable
✓ Commercial
✓ Incremental



Industry is losing pace with its clients' needs

x2

as many indicators that asset managers are delivering an unfavourable CX than a favourable one¹

This presents an opportunity, but ...

75%

of asset managers are not ready to seize it¹

"Asset management distribution organisations have failed to keep up with buyer needs and client demands"
Casey Quirk, 2019

Early movers are using CX to secure competitive advantage



- Improved productivity**
- ✓ Increased revenue retention
 - ✓ Greater organic growth
 - ✓ Targeted and efficient prospecting



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

How early movers are seizing the opportunity

- Understanding their current CX & how they compare
- Gaining insights into clients' needs
- Defining a suitable and feasible CX strategy
- Implementing intuitive, coherent and efficient client journeys
- Adopting a culture of client centricity
- Instituting CX governance and controls
- Delivering CX improvement programmes



Accomplish's purpose-built range of services

- CX maturity assessments
- CX data analytics and segmentation
- CX strategy definition
- Client journey design
- Client centricity initiatives & training
- CX governance assessments
- CX programme reviews

Accomplish

Purpose-built through research



Command of the latest data



























Relevant. Brief. Gone.



1. Accomplish Consulting, 2019. Client experience has become *the* differentiator.

Why choose ~~A~~ccomplish?

Differentiators	Accomplish	Some firms	Most firms
R&D enables us to be relevant, brief, and gone			
Our range of services and skillsets are purpose-built for CX			
We chair the European Asset Management CX Forum and administer the industry CX Maturity Benchmark			
Published experts on CX in the asset management industry			
We have been in your shoes, and have lived with our decisions			
We balance subject matter expertise with 'getting it done'			
We balance rigour with soft skills			
Internal oversight and 'quality assurance' of all client deliverables			
Strong network of associates			
Broad capabilities deployed in support of a focus on CX			
Clear specialism, backed-up by case studies			
Methodologies proven across multiple firms and geographies			
Seasoned and skilled advisers			

Accomplish improves asset managers' productivity and optimises their costs through engaging, coherent and relevant client experience