

Asset Management CX Specialists

In a survival-of-the fittest market, 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 it^{1,2}

This is not good for asset managers or their clients

“Asset management distribution organisations have failed to keep up with buyer needs and client demands”
 Casey Quirk, 2019 [3]

Early movers are using CX to secure competitive advantage



- 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

How Accomplish is extending the leading edge of CX in the industry

- Common language and industry definition of B2B CX
- Industry-wide CX benchmarks
- Solving industry-level issues by developing new tools and techniques for CX Forum members
- CX community insights, support, and lessons learned
- Training to give staff knowledge and understanding of CX, as well as the ability to apply it
- Firm-specific solutions and consulting services
- Learning the art of the possible from other industries

We measure CX and help asset managers solve their problems

- Flip sides of the CX coin – we have two corresponding benchmarks:
 - The CX Maturity Benchmark measures internal CX capability
 - The CX Touchpoint Benchmark gauges alignment with what clients want
- We are implementing our “ground-breaking” technique that enables institutional asset managers to measure their own CX
- We are helping firms develop effective CX strategies in response to what they discover

Accomplish

Purpose-built through research



Command of the latest data



Relevant. Brief. Gone.



1. Accomplish, June 2019. ‘CX has become THE differentiator’.
 2. Accomplish CX Maturity Benchmark, November 2019.
 3. Casey Quirk, 2019. Distribution 2.0.