

**Accomplish**

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A man with a beard and glasses, wearing white headphones, is sitting at a wooden desk. He is looking at a computer monitor and typing on a keyboard. The background is a bright window with a view of a city. The text 'CX Fundamentals Training Course' is overlaid on the right side of the image.

**CX Fundamentals  
Training Course**

# Why CX training is essential

Life without CX training

**Ill-informed CX objectives** may be uninspiring, unachievable, and potentially at odds with each other, handing an 'own goal' to any cynics

**Knowledge, understanding, and ability to apply CX** ✓

CX objectives developed with knowledge of what good CX looks like are more likely to be understood and met

**Employee confidence & productivity** ✓

A holistic package gives staff the confidence to set stretch goals, increases their innovation, and drives quality

Life without CX training

**Incomplete** ... left to find their own solutions, staff attempts to fill their knowledge gaps will be limited by their understanding of what they don't know, leaving them with an incomplete understanding of CX

**Common language** ✓

Move 'as one' – a shared understanding of CX enables collaboration across internal boundaries

Life without CX training

**Inconsistent** ... without a common language and shared view of what CX is and how it works, inconsistent approaches may fail to connect, accentuating siloes

Catch-up with the early movers on CX

# Different courses to meet your needs

## Courses

*For everyone*

### CX Fundamentals



*For CX specialists*

### Building Blocks of CX



### Specialist topics

Key individuals can master high-value topics:

- Best practice client segmentation
- Listening to the voice of the client
- Post-M&A CX

**CX Fundamentals** – the entry-level course that gives teams, departments, and entire organisations the foundational 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 your peers using industry CX benchmarks

**Building blocks of CX** – designed for CX specialists who want to take their asset management CX training to the next level:

- Analyse the individual building blocks of CX in detail
- Master CX strategies, client journeys, governance, culture, and CX data & analytics
- Explore ways to assemble them into new solutions for your organization, and to evaluate their quality

**Built for asset managers by asset managers**

# CX Fundamentals Course

**CX Fundamentals is the entry-level course that gives staff the foundational knowledge and understanding of CX they need, as well as the ability to apply it**

*“Everyone in our firm should take this course when they join.”* 

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**

# A common understanding smooths change



Remote working just made the biggest problem with achieving any strategic change even more difficult: how to align everyone?<sup>1</sup>

Accomplish's CX training courses help teams, departments, and entire organisations create a shared view of the importance of CX, of what good CX looks like, and of how to become client-led.

Firms can use CX training to catch-up with the early movers and industry leaders.

As CX has become THE differentiator, 68% of asset managers expect to increase the strategic importance they place on it.<sup>2</sup>

But for a firm to stand-out through CX it must first align internally on the fundamentals.

# Is CX Fundamentals the course for you?

What do you want to achieve?	Package	Price <sup>1</sup>	Notes
<b>Become</b> a client-led team	1. Up to 6 users on <a href="http://www.accomplish.world">www.accomplish.world</a>	£ 3,570	Free for CX Forum premium members. Unit price = £595.
<b>Evolve</b> into a client-led department	2. Up to 20 users on <a href="http://www.accomplish.world">www.accomplish.world</a>	£ 9,900	Unit price = £495.
	3. Up to 50 users on <a href="http://www.accomplish.world">www.accomplish.world</a>	£ 19,750	Unit price = £395.
	4. Up to 200 users on <a href="http://www.accomplish.world">www.accomplish.world</a>	£ 39,000	Unit price = £195. <sup>2</sup> Ability to customise the course.
<b>Transform</b> into a client-led business unit	5. One-year licence to run CX Fundamentals on your own systems.	£ 49,000	
<b>Go all the way</b> and facilitate client centricity across all touchpoints on your end-to-end client journey	6. Three-year licence to run CX Fundamentals on your own systems.	£ 117,000	Payable in thirds over 3 years. Ability to customise 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.



Align internally



Set informed objectives



Benchmark compatible



1. Prices exclude sales tax.
2. Stand-alone site, optimised UX, with the ability to add your own course introduction, CX strategy, client segmentation, case studies, tests, and closing remarks.

Proud to share our hopes and dreams with our local community  
[www.genieshares.com](http://www.genieshares.com)

**GenieShares**