



Accomplish



Because actions speak louder than words



The
Behavioral
Benchmark

Are your clients buying, staying, and buying more?

Client behavior is the reliable indicator of demand

Humans are tricky creatures

On its own, what clients say (feedback) will contain gaps and inaccuracies

- 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, we avoid difficult conversations, and what we say can dramatically contradict what we do. ^{1,2,3,4}



"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.

Leading asset managers are responding rapidly to client behavior

"This is exactly the type of data we've been looking for – clients, markets, and competitors."
 A Head of Analytics and Insights

Mini ROI case studies

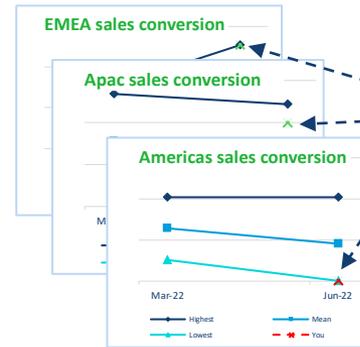
Seize growth opportunities (buy)



Early warning – disparity between metrics.

Remediation plan – consultant relations and sales teams connected by a mutually supporting strategy.

Optimize sales conversion (buy)



Early warning – one region failed to win any pitches.

Remediation plan – transfer successful techniques to increase sales conversion.

Limit client retention issues (stay)



Early warning – too steep.

Remediation plan – root cause identified; mitigation plan to stem further outflows.

Minimize cost of sale (buy more)



Early warning – low cross-sales vs new sales.

Remediation plan – combined client retention and cross-selling strategy to reduce the cost of sale.

With BI that pays for itself, there will be winners and losers

Key features of the 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:
 - Get them to buy, stay, and buy more.
 - Leading behavioral indicators.
 - 100% quant.
 - Institutional. Intermediary.
 - Americas. EMEA. Apac.
-  Unique business intelligence:
 - Clients.
 - Markets.
 - Competitors.
-  Early warning of opportunities and threats.

Designed for asset managers by asset managers

How a behavior-driven distribution strategy works

"The Behavioral Benchmark really got us thinking about some of the basics we had been taking for granted!"
A Head of Business Intelligence

Problem: filter failure

"It's information overload."

"How should we choose the metrics that need our attention?"



"I can't see the wood for the trees."

"We spend more time measuring than actually doing."

"We always seem to find out after it's too late."

Solution: embed client behaviors into your targets and strategies

Input behaviors

Achieve your objective by stimulating tactical client behaviors

- ✓ Select the behaviors you need marketing, sales, and service to stimulate to achieve your objectives.
- ✓ Incremental, leading indicators.
- ✓ Customize your dashboard.
- ✓ Assign owners and start measuring.
- ✓ Industry standard ensures comparability.

2. How you get it

Output behaviors

Strategic client behaviors

Get clients to:

- Buy.
- Stay.
- Buy more.

1. What you want

Identify your behavioral objectives

- ✓ Measures of success.
- ✓ Dollarizable, lagging indicators.

Set targets

Example reports

See the wood for the trees

Global institutional Executive summary		Anonymized		
	Input behaviors	Page(s)	Output behaviors	Page(s)
Highlights	RFP success rate (EMEA)	35	Sales conversion (EMEA)	17,18
	Onboarding medians (liquid assets)	37,40	Products and mandates per client	19/20
	Query completion (global)	21	Client tenure (Japan & Apac ex-Japan)	
Lowlights	Web engagement (EMEA)	23-29	Buy ratings per product	16
	3-year investment performance (Japan & Japan)	42	Client tenure (EMEA)	21
Key data gaps	Events	30-32		
	Email open rate (global)	51		
	Email clickthroughs (global)	52		

The Behavioral Benchmark Because actions speak louder than words 8

- Independent analytics and interpretation.
- Accomplish's observations and hypotheses about your data.
- Strengthen your own conclusions.

A behavioral lens on business strategy

Institutional Americas Your effect on client behavior		Anonymized			
Client	Moment that matters	Indicator	Metric		
1. Awareness	1.1. Web engagement	Leading	Number of unique web visitors	4	100%
		Lagging	Quarterly change in organic web traffic	50,5	100%
		Lagging	Quarterly change in institutional site visits	50,5	100%
		Lagging	Web site page weight	50,5	100%
		Lagging	Return visitor rate on our institutional web pages	50,5	100%
		Lagging	Time spent on thought leadership pages	50,5	100%
		Lagging	Download rate of investment solutions	50,5	100%
		Lagging	Event attendance	50,5	100%
		Lagging	Event turn-over	50,5	100%
		Lagging	Operational status of thought leadership	50,5	100%
2. Evaluation	2.1. Events	Leading	Download rate of investment solutions	50,5	100%
		Lagging	Event turn-over	50,5	100%
		Lagging	Operational status of thought leadership	50,5	100%
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3. Onboarding	3.1. Products	Leading	Number of products per client	50,5	100%
		Lagging	Number of mandates per client	50,5	100%
		Lagging	Client tenure (Japan & Apac ex-Japan)	50,5	100%
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4. Service consumption	4.1. Onboarding	Leading	Number of products per client	50,5	100%
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- Monitor your end-to-end behavioral effect on clients.
- See the strategic and dollarizable 'output' behaviors in context of the tactical 'input' behaviors that you can stimulate directly.

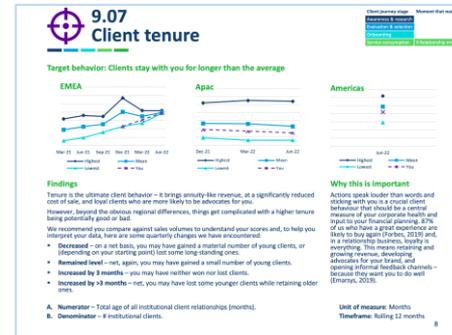
Make science-based decisions

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- Manage regional differences in client behavior.
- Exploit behavioral norms across markets.
- Internal strengths and weaknesses.

Detailed analytics per metric



- This firm does it globally:
- Ballparks, ranges, averages, and direction of travel.
- Expert interpretation.
- This firm's client tenure is rising too fast in EMEA: it is losing younger relationships there.

Accomplish's main audiences are Distribution Leaders and BI Teams

Previously unavailable capabilities asset managers have gained from the benchmark



Strategic use cases

Connect your distribution strategy

- ✓ Marketing, sales, and service exist to stimulate client behaviors.
- ✓ Define your objectives with client behaviors – to buy, stay, and buy more – and align your underlying strategies to achieve them.

Target strategic behaviors

- ✓ Embed client behaviors in your business targets.
- ✓ Monitor progress towards objectives by your effect on client behavior.
- ✓ Respond nimbly and effectively to a volatile environment.

Make science-based decisions

- ✓ Use behavioral analytics to make science-based decisions.
- ✓ Leading and lagging indicators yield vital insights.

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

Align your BI with your business strategy

Coming soon

Improve your sales conversion

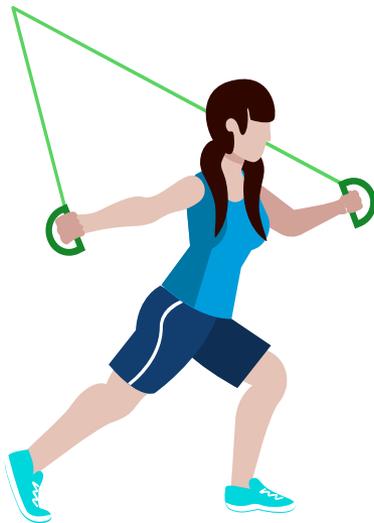
A scientific approach to client tenure

Coming soon

Annual plans now include client behavior targets

Coming soon

Discover your weaknesses BEFORE it's too late



The Accomplish behavioral analytics platform



Microsoft's Power BI leads the Gartner Magic Quadrant™ for Analytics and BI Platforms (2022)

Microsoft Power BI <https://app.powerbi.com>

Personalise your settings and visualizations  

See everything in one place and identify your priorities

Export 

Filter and sort your data	Region	Segment	Moments that matter	Behavior type	Metric	Average	Your data	Flag
	(Select all)	(Select all)	(Select all)	(Select all)	(Select all)	(Select all)	(Select all)	(Select all)
	Americas	Institutional	Web engagement	Input	Metric ₁	XXX	YYY	Flag
	EMEA	Intermediary	Events	Output	Metric ₂	XXX	YYY	No flag
	Apac		Podcasts	Buy	Metric _n	XXX	YYY	
			RFPs, RFIs and sales	Stay				
			Onboarding	Buy more				
			Inv't performance					
			Inv't reporting					
			Queries & issues					
		Relationship mgmt						
		Exit / run-off						

Drill down into specific metrics

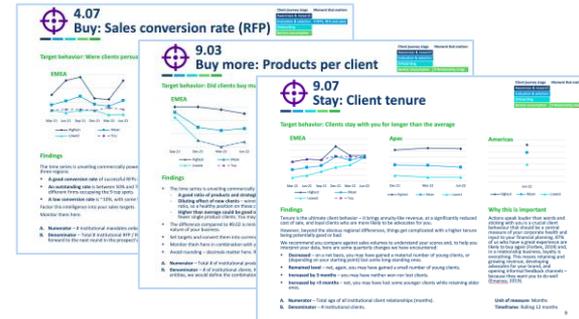
Drill down into specific metrics

Export to xls, csv, ppt, pdf, png 

Visualizations and analytics

-  Interact with your data.
-  Leverage independent expert interpretations.
-  Check the meaning and importance of each metric.
-  Identify relationships between different behaviors.

Explore combinations of your most important metrics



Team Accomplish

[Book a 20-minute demo with Adam](#)



Adam Grainger
Founder and MD

+20-year veteran of the investment industry.
Client experience.
Behavioral analytics.
Data science.
Business intelligence.

+44 7889 178019
adam.grainger@accomplish.world

[in Adam Grainger](#)



Jonathan Attoh
Client Experience Analyst

Data scientist experienced in identifying patterns, making interpretations, and conveying findings. Software engineer.

+44 7467 187072
jonathan.attoh@accomplish.world

[in Jonathan Attoh](#)



Sean Brady
Executive Chairman

25 years' experience of strategy and implementation, as a senior officer in the UK military.

+44 7711 006847
sean.brady@accomplish.world

[in Sean Brady](#)

