

Accomplish

*"A good experience is forgettable.
Only the extraordinary gets
remembered, shared, and discussed."*



The Asset Management CX Maturity Benchmark

Seize the information advantage.

Independent. Balanced. Collaborative. Team-building. Alignment.

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 ✗ *Market over-supply*
- Pricing ✗ *Price-taking*
- Brand ✗ *External events*



Headwinds

Reliable differentiators



Tailwinds

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

We are here

What can you do about it?

Measure it



CX Maturity Benchmark

Evaluate

your internal CX capability

Compare

your 'effect' on clients' behaviour



CX Touchpoint Benchmark

Engage

with the industry CX community



CX Forum



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

We are proud to share our hopes and dreams with our local community

GenieShares

Accomplish

Purpose-built through research



Command of the latest data



Relevant. Brief. Gone.



Evaluate your CX capability with the CX Maturity Benchmark

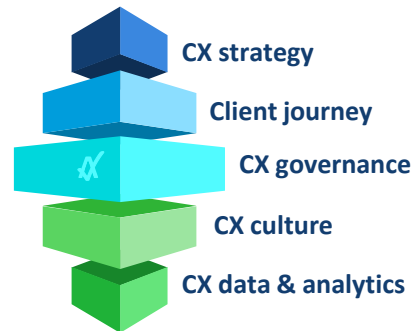


"Invaluable counsel about where the leading edge is and ways to get there." CX Programme lead

A dataset of CX capability

- A unique and powerful dataset of direct peers, against which you can evaluate your firm
- Holistic definition of CX in the context of B2B asset management ¹
 - 5 Building Blocks of CX
 - 5 stages of maturity
- Independent evaluation and validation

The Building Blocks of CX[®]



Evaluate your internal CX capability

- Understand the strength of your firm's CX capability, and how it compares to your direct peers ²
- Find out which issues you face are firm-specific and which are industry-wide
- Learn how to apply the common language and definition of CX for B2B asset managers

Translate the findings into a CX strategy

- Customised and objective recommendations for your CX strategy that will match your starting position, ambition, and organisational sphere of influence
- Lay out the tasks needed to address any firm-specific and industry-wide issues you face
- Leverage lessons learned from other asset managers about the likely challenges and opportunities ahead

5 stages of maturity

5: Client centricity – BAU revolves around serving clients and prospects

4: CX institutionalisation – top-to-bottom & end-to-end focus on clients

3: CX foundations are in place, connected and functioning

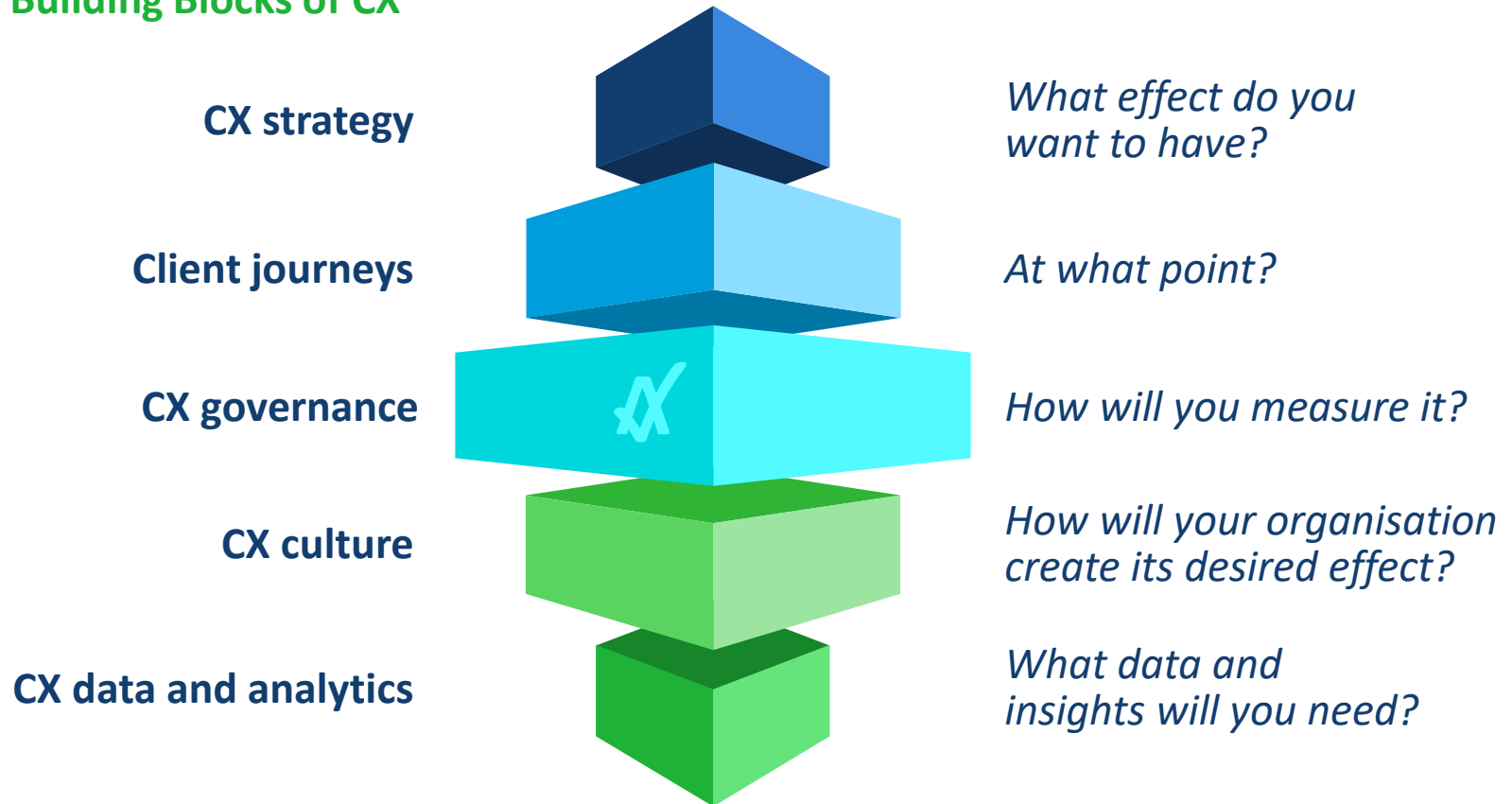
2: Awareness and basic elements

1: Limited or no CX awareness

The firms that dominate the leader board of CX maturity have a clear strategy

A unique and powerful dataset

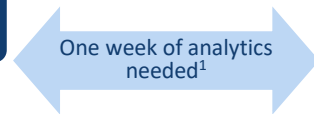
The Building Blocks of CX[®]



Common language and definition of CX
Designed by a working group of the Asset Management CX Forum

Independent. Collaborative. Balanced.

3 steps to the CX Maturity Benchmark



Data gathering interviews (60 mins)

- Balanced sample of stakeholders²
- Interview structure:
 - Introductory briefing to align on the fundamentals of CX³
 - Independent and collaborative assessment of your CX maturity per building block
 - Normalisation of your scores across dataset
- Across single or multiple business units

Presentations of your CX maturity report (60 mins)

- Absolute and relative maturity of each team's CX capability – in general, and against each building block
- Strengths you can build on, and weaknesses (industry-wide vs. firm-specific)
- Recommended goals and approaches for your CX strategy
- The number of sessions will depend on the number of business units and the sponsors goals

Ongoing membership of the Asset Management CX Forum

- Unearth peer-group insights and solve industry-wide issues together
- Ground-breaking techniques to extend the industry's leading-edge in CX
- Amplify your message within your organisation about the importance of CX

If knowing the absolute and relative strengths of your firm's CX capability would help you meet your goals, we would look forward to supporting you through the process

Costs and benefits



Costs GBP, excl. 20% sales tax

Value transferred to you	Cost	One
Accomplish's intellectual capital	5,000	✓
Data gathering and analytics	4,495	✓
Customised recommendations	5,000	✓
Price		14,495

If you would like to evaluate multiple business units, we will develop a specific proposal to ensure you meet your goals.

Benefits

- Independent and balanced assessment of the absolute and relative strengths and weaknesses of your organisation's CX capability
- Recommendations for your CX strategy that will match your starting position, ambition, and organisational sphere of influence
- Learn lessons from the global investment firms at the leading edge of CX
- Give your staff the knowledge and understanding of CX they need, as well as the ability to apply it
- Inspire your teams to act by involving them in developing a purpose to believe: the key features of a single CX strategy

A forum like no other

The industry's CX community



"Very valuable for understanding the industry direction." Head of Client Services



The Asset Management CX Forum

- As an industry, asset management was a late adopter of CX so the ways firms can exploit it have been under-researched and this has led to misunderstandings.
- The Asset Management CX Forum is fixing this problem by providing the industry-level R&D function needed to help asset managers catch up with other industries on CX. This results in better experiences for investment clients.
- Who will you mix with at the CX Forum? At the latest count in March 2021, member firms comprised 8% of the top 400 asset managers in the world.
- They represent the innovators and early adopters of CX. Many are 'blue chip' global firms.

 The CX Forum is Accomplish's gift to the industry



Examples of CX Forum R&D

- **Both of the industry's CX benchmarks came from CX Forum working groups:**
 - Evaluate your internal CX capability
 - Compare your external 'effect' on your clients' behaviour
- **Impact of COVID-19 on CX in the industry**
 - How did investment clients' needs change?
 - How did asset managers respond?
 - What does this mean for CX's direction of travel?
- **Digital CX for B2B clients** – what digital services were firms giving to B2B clients and what were their plans for the future? What effect do these services have on CX, and how were firms tracking engagement?

Not a talking shop



Purpose-built through research



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About us



We are the directors of **Accomplish**

We have a shared experience of adversity

We have been lucky

We intend to redress the balance

GenieShares makes us stronger



Accomplish leadership team



Adam Grainger

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A 20-year veteran of the investment industry.
Client experience.
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Non-executive

Over 15 years' experience helping leading organisations challenge the status quo and deliver strategic change. Also serves on several other Boards across industries.

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