

Accomplish



Client
portals
peer-
group
project

GenieShares

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dreams with our local community
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Project objective and rationale

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This project will determine the extent, nature, and usage of client portals across the institutional investment industry.

A portal has an important effect on a client's experience of consuming investment services, as well as on the asset manager's operational efficiency.

The results will be valuable because of the variety of different portals firms have developed, the ways they have met demand in the era of remote working, and the industry debate about centralisation.

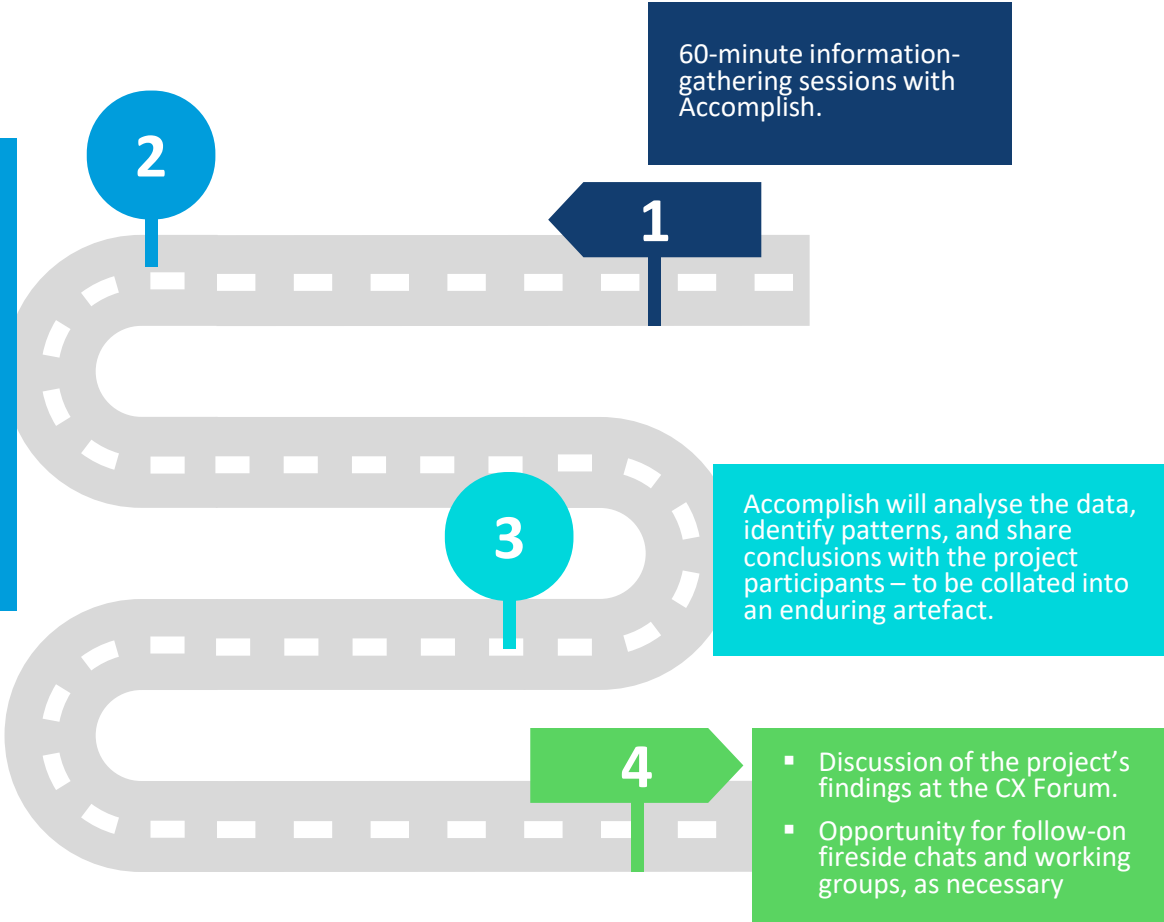


Information capture and synthesis



Project scope

1. How extensively does the industry use client portals?
2. For which client segments?
3. What functionality do they provide?
4. Level of client adoption?
5. Internal and external drivers and perceptions
6. What is your firm's assessment of the industry's strategic direction in this area?



How we will achieve the objective

“The combination of benchmarking, collaboration with Accomplish, and the inputs from across the CX community has been really valuable for us as we shape our strategy.”

