

# Accomplish



Project  
proposal:  
Managing  
different needs

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# Project objective and rationale



This project will discover how CX Forum member firms manage clients' different needs



It is important because an asset manager's alignment with what its clients want drives their impression of its value,<sup>1</sup> despite their wants and needs changing over time



It is relevant as firms manage the [impact of COVID-19](#)<sup>2</sup> by striking new balances within their business models and client journeys

1. Marketing malpractice: the cause and the cure. Christensen, et al (2005).
2. The impact of COVID-19 on client experience in asset management. Accomplish, May 2020.

*“The facilitation unearthed many more insights than we expected.”*

# How we will achieve the objective



## Approach



# Information capture and synthesis



**Discussion agenda**

1. Service model differentiation – do you tier clients? If so, what factors do you use?
2. How do you balance granular client types against the need for a standardised client journey?
3. How strike a balance between:
  - Stated preferences and revealed preferences through digital footprint
  - Customisation and standardisation?
  - Digital and non-digital touchpoints?
4. How handle changing requirements across the client journey, i.e. what they really want changes, or turns out to be different from what you thought they wanted?

