

Client journey	Key stages of behavioral conversion	Traditional institutional CX	AI-driven institutional CX	Measurable and 'benchmarkable' benefits
Pre-sale experience	Digital Engagement	Passive digital presence with static emails, limited social media activity, and generic website interactions. Generic social media posts, broad newsletters, and mass email campaigns with limited personalization.	AI-driven personalized content and digital outreach for institutional prospects. This includes tailoring website content or research recommendations based on user behavior, targeted account-based marketing (ABM) campaigns, and sentiment analysis of social media or news to gauge client interests.	Increased conversion to your website from social and email Increased web engagement
	In-Person Engagement: Buy Ratings	Buy ratings – consultant relations teams keep consultant databases up to date and manage relationships to increase support for their product range.	Leverage AI to improve the firm's visibility with investment consultants and increase the likelihood of securing "Buy" ratings or recommendations. This could involve building an agent to update consultant databases, using AI to analyze consultants' research interests, past reports, and scoring criteria, then tailoring the firm's outreach and product positioning to align with consultants' needs.	Increased breadth and depth of buy ratings
	In-Person Engagement: Events	Event intelligence and lead prioritization - clients register for and attend investment events where relationship managers aim to convert attendance into a follow-up meeting.	Use AI to maximize the value of your investment events by gathering intelligence and prioritizing follow-ups. This involves analyzing event data – for instance, identifying which presentation topics or discussions generated interest, tracking attendee interactions, and scoring leads to highlight high-potential prospects for the sales team. AI can help sales and marketing teams focus their limited time on the most promising leads encountered during events	Increased event attendance and turn-up rates Increased conversion from event attendance to prospecting meetings

	In-Person Engagement: RFPs	Manual creation of RFP content with semi-automated collation into a draft RFP response.	Apply AI to streamline the Request for Proposal process. This use case focuses on using natural language processing and generation to assist in drafting RFP responses, automatically answering common questions by drawing from a database of past proposals, and generally reducing the manual workload on the RFP team. It may include an intelligent search of past RFP answers, suggestions of relevant content to include, or even auto-generating first drafts for review.	Increased RFP success rate
	Sales Conversion (\$)	If called forward to pitch, relationship managers rely on intuition and past experiences to pitch investment solutions.	Emphasizes AI-driven pitch preparation, proposal personalization, and post-meeting follow-ups. For example, AI can help craft tailored pitch books or proposals for each prospect and generate intelligent follow-up emails or talking points after meetings. These applications directly support the sales team in delivering more relevant and timely communications to institutional prospects.	Increased pitch win rate (\$)
Post-sale experience	Onboarding (\$)	Contract negotiation is manual, requiring significant back-and-forth between legal teams. Onboarding can be paper-heavy, with lengthy compliance and asset transition processes.	Streamlining client onboarding processes with AI. Examples include AI-assisted contract negotiation and review, automated compliance checks (KYC/AML), and the coordination of asset transfers.	Faster onboarding (\$)
	Client Reporting	Clients receive static quarterly reports with little opportunity for dynamic engagement. A client service professional responds to any investor inquiries.	Enhancing ongoing reporting with AI. This includes live reporting dashboards with portfolio updates, AI-generated insights (automated commentary on performance or risk), interactive reports where clients can query data, and virtual assistants that proactively reach out with updates or answer routine queries. It also covers automation of standard client service tasks like repeat submissions of due diligence questionnaires (DDQs).	Increased client reporting fulfillment rates Faster delivery times
	Client Portal Engagement	A broad range applies here: some firms do not have client portals, and others use third-party or their own proprietary models. On average, the range of insights they provide on client engagement runs from 'nil' to the provision of raw engagement data.	AI will enable proprietary and third-party portal solutions with dynamic, highly personalized experiences, portfolio analytics, tailored insights, predictive recommendations, and interactive client support (chatbots or virtual assistants). Increased client engagement and insights into client interests and patterns of behavior, improved customer satisfaction (via tailored recommendations and analytics), enhanced operational efficiency, and competitive differentiation.	Increased client engagement and insights into behavior patterns

	Relationship Management (\$)	<p>Relationship managers schedule periodic meetings. Client engagement is reactive, responding mainly to client requests and issues. Client retention strategies are often informal, reactive, and triggered when clients express dissatisfaction, by which time it may already be too late. Product recommendations are based on broad segmentation or the asset manager's 'focus funds' for the year rather than specific client needs.</p>	<p>Using AI to deepen client relationships and prevent churn. Key capabilities: monitoring all client interactions and sentiment (emails, calls, meeting notes) to gauge health, providing alerts for proactive outreach (e.g. if a client's engagement drops or their sentiment turns negative), recommending the "next best action" (such as suggesting a new product or a timely conversation topic), and predicting which clients are at risk of leaving so that RMs can intervene early. It also involves cross-selling insights – identifying which additional solutions might interest a client based on their profile and behavior – and benchmarking client engagement versus peers to identify gaps.</p>	<p>Increased 'discretionary' client meeting volumes</p> <p>Increased product-per-client ratio (\$)</p> <p>Longer client tenure (\$\$\$)</p>
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