Rebounding from Change: An Investment Manager's Toolkit

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Executive Summary:



Change is inevitable for investment managers, and it comes in varying guises, including mergers and acquisitions, leadership changes, the departure of prominent fund managers, major cost reduction programs, and fundamentally new regulatory requirements. These changes require managers to take action, step forward and do something different than “business as usual.”

Given the level of competition and choice within the investment management industry, an inability to handle change, and handle it well, can be a major detractor, with negative implications ranging from a loss of clients, to investment strategy downgrades and an inability to engage consultants, to an all-consuming internal focus that damages the fabric and culture of the firm. Managers who don’t rebound from change can find themselves at a considerable competitive disadvantage.

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