Reimagined Client Experience

Leveraging Technology to Deepen Institutional Relationships

February 26, 2020
Executive Summary:

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During the third quarter of 2019, Greenwich Associates conducted a global initiative designed to uncover how asset managers can invest in and use technology to improve and redefine the client experience. Our interviews with over 150 senior decision-makers at large institutions across North America and Europe revealed their digital preferences and “must haves” as well as the influential role that a manager’s technology capabilities will have on the manager selection process.

Findings from the study data can help asset managers prioritize how they invest in information technology in order to achieve a strong ROI in terms of client relationships and growth. Here are some noteworthy insights from the research:

- Overall, asset managers have not delivered on investors’ increasing technology needs and expectations across the client journey.
- Investors value user-friendly online portal tools with detailed portfolio information and the functionality to perform custom analytics.
- Best-in-class managers leverage technology to enhance client relationships through the delivery of data and insights in an automated and customized manner.
- In the next 3–5 years, a manager’s technology capabilities will play an increased role in how institutional investors evaluate and select their asset managers.

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