

Reimagined Client Experience

Leveraging Technology to Deepen Institutional Relationships

February 26, 2020

Executive Summary:



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.

The data reported in this document reflect solely the views reported to Greenwich Associates by the research participants. Interviewees may be asked about their use of and demand for financial products and services and about investment practices in relevant financial markets. Greenwich Associates compiles the data received, conducts statistical analysis and reviews for presentation purposes in order to produce the final results. Unless otherwise indicated, any opinions or market observations made are strictly our own.

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