Pandemic Perspectives (Part 8) – Using Analytics to Transform Sales, Win New Assets

May 13, 2020

As the lockdown gradually eases in many countries, institutional investors are increasingly reviewing opportunistic as well as strategic investment options.

Against this backdrop, sales activity is beginning to pick up, and asset managers are considering what they need to do to sharpen and maximize their sales efforts.

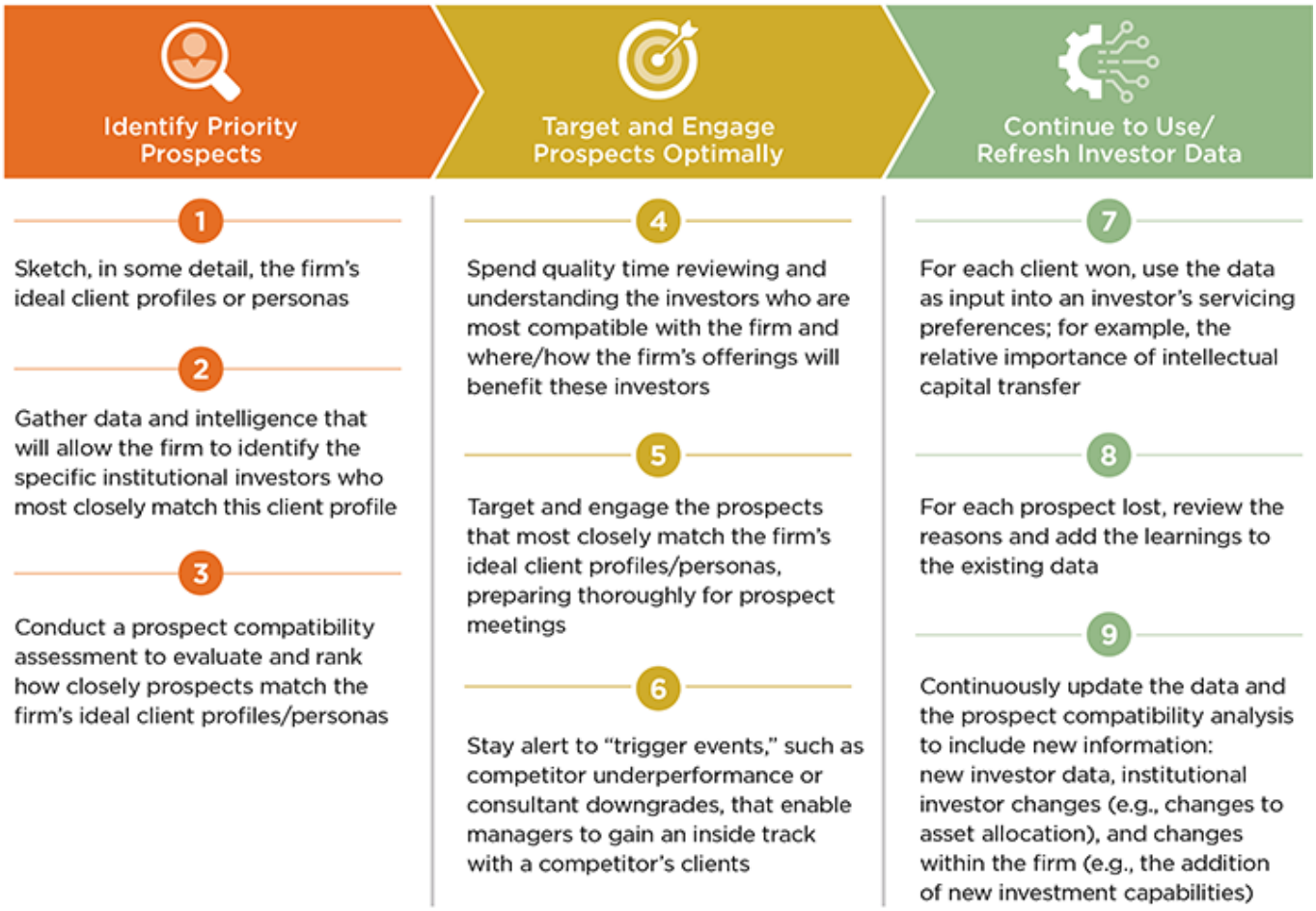
Our new report, Sales Performance Excellence: Strategic Prospecting and Engagement, finds that top-quartile distribution professionals attract close to three times the amount of assets annually as median professionals. The secret weapon is data analytics that allow them to precisely locate attractive targets and tailor custom sales pitches.



To win in today's evolving and hypercompetitive market, asset management sales teams must be laser-focused on the highest probability prospects and equipped to maximize every opportunity.

To have a lasting impact on sales effectiveness, asset managers must have the right data and analytic platforms, and incorporate them into a sales approach that combines highly talented sales professionals with an organizational commitment to the strategy and the process.

STRATEGIC PROSPECTING AND ENGAGEMENT



Source: Greenwich Associates 2020

In addition to eliminating wasted time spent on low-probability sales opportunities, managers that adopt these practices are winning a disproportionate share of new business opportunities. They are also positively impacting their brand image and ensuring that new client relationships get off on the right footing, setting the groundwork for positive long-term client relationships.

Our Pandemic Perspectives blog series highlights recent findings from our COVID-19 flash studies, which indicate that some sales activity has continued during the crisis. As the crisis abates, institutional investors will be reviewing, and in some cases resetting, their investment strategies and manager rosters. Asset managers must put themselves in the best position to maximize these sales opportunities.

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