Client-Centricity: Building a Strategic Advantage through Superior Service

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Executive Summary:



Asset managers are working to create “client-centric” business models that allow them to deliver superior service to all clients and to partner with their best clients as strategic advisors. This report examines what it means for an asset manager to adopt a client-centric approach and outlines the steps required to implement a truly client-centric strategy.

Those steps include monitoring and measuring service quality, staffing the client experience and creating strategic partnerships with top clients. The report also looks at how asset managers can elevate service through persona-based segmentation techniques that allow them to focus resources on the prospects and clients that are best aligned with the firm’s capabilities and approach, and offer the highest potential value to the firm.

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