

Enhancing the Client Experience

2023 Global Institutional Investor Research - North America

October 31, 2023

Executive Summary:

Coalition Greenwich's 2023 Client Experience Research aims to help asset managers define best practices and avoid pitfalls by examining institutional investors' needs and preferences in each stage of the client journey, from sales and onboarding to client servicing and relationship reviews.

Methodology:

Coalition Greenwich interviewed large institutions across North America, EMEA, and APAC. Results presented here are based on 119 interviews with North American investors (100 in the United States and 19 in Canada), conducted in July and August of 2023.



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