Best Practices in Institutional Distribution

October 29, 2014

Executive Summary:

A series of changes in institutional markets have intensified the competition for investment assets while ratcheting up expectations among prospects and clients. In the current post-crisis environment institutional investors are looking to investment managers for two things: 1) advice on how to succeed, and 2) new products and solutions.

These changes have important implications for asset management distribution strategies. Firms now need to deploy more sophisticated distribution strategies and discard the traditional product-based model in favor of client-focused, solutions-based approaches.

In an effort to help readers make this transition and improve the effectiveness of their own distribution efforts, Greenwich Associates presents 24 best practices across sales, consultant relations, and relationship management.

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