

Sales Trader of the Future

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Executive Summary:

The sales trader of the future looks dramatically different than in the past. While the major method of differentiation—relationships—has not changed, the definition has evolved.

Today relationships mean providing the right kind of information and services that make the buy-side trader look smart in front of the portfolio manager and ultimately lead to a better ranking in the broker-vote process. Establishing these newly defined relationships is how the future sales trader can cement his importance.

Enter sales trader technology. The next generation of sales trader tools goes beyond the CRM systems common today and will enable sales traders to send custom suggestions via the client's preferred method of communication, and do that on a scale that wasn't possible before.



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