Competitive Challenges U.S. Internal Benchmarking

February 3, 2017

Executive Summary:

This Competitive Challenges presentation covers a comprehensive analysis of sales, consultant relations, and client service productivity, including side-by-side comparisons with customized peer groups of competitors.

Methodology:

Competitive Challenges is a productivity benchmarking study for the investment management industry focused on institutional distribution. The research provides a high-level view of key performance indicators, paired with highly actionable drill-down analysis, integrated with valuable institutional investor and investment consultant perceptions from Greenwich Associates' syndicated research. Additionally, our consultants work with clients to analyze the results and form recommendations to drive tactical development.

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