Client Journey Mapping

Improving the Investor Experience

September 6, 2017
Executive Summary:

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Greenwich Associates research reveals that approximately 70% of an investor's perception of an asset manager is linked to investment performance. Without competitive investment performance, little else matters in the long run. The remaining 30% relates to "service" in the broadest sense—all the other interactions that an investor has with an asset manager. As strong investment performance increasingly becomes a "ticket to the game" or "table stakes," managers are looking to these service factors to differentiate themselves from the competition.

Greenwich Associates research indicates that excellence in servicing leads to higher client retention, particularly during the inevitable periods of subpar investment performance, and also to higher levels of cross sales. A simple yet very effective tool that managers are adopting to improve investor experience is client journey mapping.

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