Consultant Relations Playbook

October 13, 2017

Executive Summary:

Asset management is a team sport that requires tremendous coordination among multiple individuals and groups, each with a variety of unique skills and capabilities. Coaches (managers) who put the time and effort into properly training their athletes (employees) and developing a cohesive game plan (business strategy) usually achieve superior outcomes. This is particularly true when working with investment consultants—a critical intermediary in the institutional asset management market.

Outlined below are Greenwich Associates 10 key steps to ensure a greater chance at achieving a winning record with investment consultants.

- Field the right team
- Shape your season schedule
- Go deep and broad
- Respect the boundaries
- Communicate, communicate, communicate
- Collaborate to win
- Stick to the game plan
- Bring consultants into the locker room
- Train in the offseason

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