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Is your firm behind in leveraging mobile technology and social media to enhance your client's experience?

In this three part series; Investit Intelligence will analyze and discuss opportunities for your firm to prepare and succeed in enhancing your client's experience with mobile technology and social media. Find out what other investment firms are doing and how your firm can be successful with these new technologies.

Part II: Mobile Technology: The Inflection Point

Mobile technology is creating a fundamental shift in human behavior. It offers the ability to access information everywhere, at any time, and engage with anyone, transforming the once simple cell phone into a mobile computer.

Mobile technology has existed for several decades in one form or another, with the First Generation (1G) mobile phone introduced to the public market in 1983 by Motorola using analogue technology. Today, there are 5.3 billion mobile subscribers globally, a number equivalent to 77% of the world population. Over a relatively short period of time, the explosive adoption rates of this technology among consumers and business users alike have made it one of the most widely used technologies today, and one that is fundamentally changing behavior.

With 90% of the world population having access to mobile networks, we are quickly reaching an inflection point where mobility will outpace the PC.

- Sales of mobile devices are expected to outpace PC sales in as early as 2012
- Mobile internet access is expected to overtake the PC as the most popular means for accessing the web by 2013

Deploying Mobile Technology

With the pervasive nature of mobile technology in our personal lives, it is a natural progression that this technology has made its way into the corporate environment. The investment industry is not an exception. Firms are realizing that they must embrace mobility to remain competitive and increase efficiency in their organizations, particularly in a climate of downsizing and lean economic times. There are a number of benefits and new opportunities to be recognized through the use of mobile technology, with significant improvements in employee productivity proving to be a major factor. Investment managers are also embracing mobility in client facing roles where the technology facilitates an interactive discussion and provides a richer client experience.

There are, however, as many risks and challenges with enterprise mobility, particularly as personal and business use of mobile devices blur and employees are finding ways of enabling them on corporate networks whether sanctioned or unsanctioned. For investment

Leveraging New Technology

On January 18 at 1:00 EST join Investit in our webcast on the topic.

Register for this event

Part I: Leveraging New Technology: Are You Ready? (December 14, 2011)

Part 2: Mobile Technology: The Inflection Point (January 4, 2012)

Part 3: Social Media: Amplify Your Communications (January 11, 2012)

About Investit

Since 1998, Investit has helped investment firms increase profitability by leveraging our unique investigate, assess, and achieve methodology. The Intelligence program is the investigate component of the methodology.

Spring 2012 Intelligence Topics

Data Management: The Journey Continues

This research focuses on the current state of data management among investment managers and third party administrators and will identify how firms need to prepare for the future impact of new technologies, increased demands, and the exponential growth in data volumes.

Building Your Business Efficiently

This research identifies practical methods for improving operational efficiency based on current practices among investment managers. We will specify key indicators for measuring your capabilities and optimizing your operations to support growth and new business initiatives.

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managers, the emphasis on security and control is even greater due to the intensive regulatory environment of this industry. The speed of change and proliferation of new platforms is also challenging IT to maintain the appropriate levels of control and ensure adherence to corporate and regulatory policy. Many firms are implementing third party mobile device management (MDM) products to provide central control over multiple mobile devices deployed for business use. Based on the results of an Investit survey, 89% of investment managers deploy MDM solutions to support mobility.

Establishing a Mobile Presence

Across the globe, the mobile channel is growing rapidly and businesses are racing to catch up with the skyrocketing consumer adoption of mobile activities. For investment managers, several firms have a mobile strategy in place to engage their clients and enhance their brand in the market. However, more firms are either in the early stages of their strategy or have plans to implement a mobile technology strategy in the next 6-12 months. Based on the results of a recent Investit survey, more firms have a strategy in place for their retail investors (27% of firms), whether direct or through intermediaries, than for their institutional clients (11% of firms). Many firms are in the process of implementing a mobile strategy in the next 6-12 months or are considering one, particularly in the institutional space, where 89% of firms are either implementing or considering mobility.

Implementing a mobile strategy to provide content to your clients and prospects requires all levels of the organization to develop a coherent and clear view of its clients and how they engage across the business. This will require a focused investment in cross-touch points, an evolution of key performance indicators (KPIs), and a strong commitment to a continuous process of measuring and optimizing your strategy. Similar to the development of a website strategy, mobile services will evolve as firms are able to show success of early efforts and make the case for additional resources and development.

The mobile offerings provided by investment management firms range from simple extensions of their websites adjusted for the mobile device, to fully functioning applications. Some of the offerings provide general content available in the public domain but organized and formatted for quick and easy access through a mobile device, where others offer access to client-specific data with various tools that allow clients to interact with that information

The Future

The pervasive use of mobile technology will require all investment management firms to incorporate a mobile component in every client communications and client servicing strategy. In fact, firms today are already factoring mobility in all website and portal enhancement plans and budgets. Although demand for mobile may not exist across your entire client base today, you will need to include mobility to remain competitive as over time, mobile access will be expected

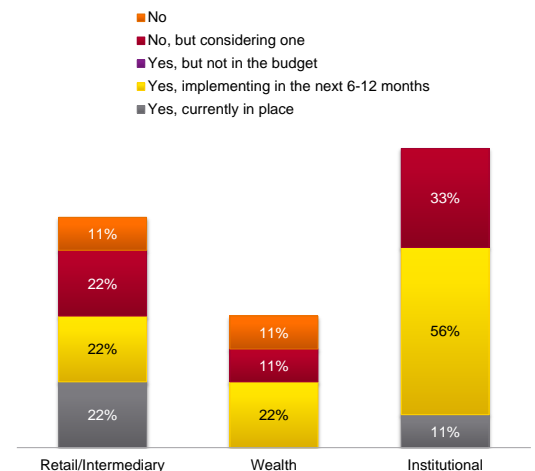
Technical innovation will continue to offer new opportunities for connecting with your clients, but the rapid evolution will require careful planning and the agility to adapt your strategies.

Look for Part 3 of this series on Leveraging Technology to Enhance the Client Experience.

Part 3: Social Media: Amplify Your Market Communications (January 10, 2012)

Join Investit.Intelligence for 1 hour on January 18th at 1:00 EST (12:00 CST, 10:00 PST) for our review of how your firm can prepare for **Leveraging New Technologies to Enhance the Client Experience**.

Current state of investment management firms' mobile technology strategies



Register for this event

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