

## ‘Enriching the Client Experience’

Investit Intelligence’s latest report detailing how investment managers can enrich their clients’ experience

### How you will benefit from this report

Excellent client management improves client perceptions of the value they receive from their investment manager: 60% of pension schemes will give an under-performing manager more time to improve investment performance, if the manager’s client management is excellent.

Investit has recently completed an extensive investigation into how investment managers can enrich ‘The Client Experience’. This key research has:

- Identified the six areas of institutional client management where managers should place particular focus.
- Identified the aspects that are most important to institutional clients when performance is below target.
- Investigated current market practice.
- Designed a high-level best practice operating model for client management.
- Developed a method for enriching the client experience.

Investment managers that follow the advice and recommendations contained in this report will improve their chances of retaining more business in a more competitive world.

### Key insights from the industry experts

This report is part of a programme of research that has been carried out over a period of more than six years, which has consistently informed the investment industry regarding best practice in the area of institutional client management. Previous reports feature:



During this period, Investit has conducted over 750 interviews with institutional clients across Europe, North America, and Asia-Pacific. We have also worked with over 50 investment managers to assess and adapt their client management processes.

### What the report contains

The report contains the following chapters: Client Servicing – the Client Perspective; The Client Management Framework; Market Practice; The Role of Outsource Providers in Client Management; Regulation as a driver for change; Other Drivers for Change; Best Practice Client Management; and Enriching the Client Experience.

### Getting access to the research

If your company is a member of Investit’s Intelligence service, you are entitled to a copy of the full research report, on-line access, and a benchmarking report showing how your client management capability compares to market practice.

If your company is not a member of Intelligence, you can purchase the full research report for £5,000. If you purchase the report before 19 August 2011, we will include a bespoke client management benchmarking report.

### Who to contact

If you would like to know more about this key report, please contact **Hilary Martin** on +44 (0)207 933 9912 or by email at [hilary.martin@investit.com](mailto:hilary.martin@investit.com).

## About Intelligence

Intelligence is a subscription-based research service, designed exclusively for the investment industry. Key features:

- Detailed, independent research reports on key industry challenges.
- On-line access to research reports.
- Forums and workshops held throughout the year.
- Access to our Consultants for general information about any aspect of our industry.

## About Investit

Investit was established in 1998. We are a specialist business consulting firm, focusing entirely on the investment management industry. We work with our clients to make their businesses better by helping them to win more business, retain more business, and improve their operating platforms. We do this by:

- Informing their strategic thinking by investigating and interpreting where the industry is going.
- Assessing how well every aspect of their business is positioned to achieve their strategy.
- Defining and delivering the changes they need to succeed with their business goals.

Our key differentiator is client loyalty: each year more than 90% of our revenues come from repeat business.

## Further information

If you would like to know more about Investit, please contact **Clare Vincent-Silk** on +44 (0)207 933 9904 or by email at [clare.vincent-silk@investit.com](mailto:clare.vincent-silk@investit.com).