

I need to . . .

TRANSFORM THE DISTRIBUTION PROCESS

A firm managing diverse investments for clients around the world realized they needed to improve the quality of the sales experience for prospects, clients, and investment consultants. They knew the project would require overhauling many business functions supporting the client cycle, including performance measurement and attribution, relationship management, institutional sales, consultant relations, product development, risk management, and marketing.

CUTTER SOLUTION

The firm asked Cutter Associates to assess their client facing strategy and to oversee the design of a client/product data architecture. They also asked us for help developing strategies for consultant database population, presentation management, CRM, the RFP process, client reporting, web portal design, and client on-boarding.

As we assessed the firm's current state, we identified weaknesses in their distribution and client/product data architecture that inhibited growth potential and posed risks to the business.

Using intelligence from CutterResearch and tools from CutterBenchmarking, including our internally developed capability models for sales, client management, and data management, the CutterConsulting team created an achievable, optimized target state for our client's data and application architecture, along with a roadmap for transitioning from the current state to the target state.

CLIENT PROFILE

Client Type:

Global Investment Manager

Assets Under Management:

Over USD 900 billion

Location:

Mid-West , USA

Cutter Practice:



Client Facing

Our target state recommendations included the following:

- Creating a client/product reporting mart
- Establishing client/product data dictionaries
- Replacing existing client reporting tools

Our client also asked us to socialize our recommendations to senior management and key business stakeholders, and then invited us to lead the implementation project for the first six months.

Our client was delighted with the results of this engagement, which included a pragmatic plan for implementing their client oriented initiatives, followed by implementation of a solution that improves client communications, enhances client service, and enables rapid creation of new products.