

Platform – Intermediary Case Study

Client Profile

A leading global provider of asset management, investment processing and investment operations for institutional and personal wealth management companies. The client provides a wealth platform enabling intermediaries to acquire, control, manage and report on all client assets on a common operating platform. The platform provides front, middle and back office IT and outsourcing solutions for organisations offering advisory and discretionary services.

The Brief

- To assist with a market segmentation exercise, and
- To introduce the prospects in the target market to the client's wealth platform proposition and to arrange quality, qualified appointments with senior executive decision makers. As the client's proposition contained a large element of outsourcing it was imperative that the relevant decision makers (and their respective roles and responsibilities were identified) in order to avoid contact with Chief Operating Officers. This is because the Chief Operating Officers potentially have a vested interest in the office function as a whole, rather than the growth aspirations of the firm.

The Target Market

The top 200 investment advisors in the UK, including Private Client Investment Managers (PCIM) & Private Banks servicing Ultra & Very High Net Worth individuals and the largest IFA firms/networks servicing the mass affluent market. Specific decision makers included, Chief Executive Officer, Managing Director, Chief Financial Officer and Finance Director.

The Campaign

The objectives of the calling effort were:

1. To gain introductory meetings with senior level executive decision makers;
2. To gain a better understanding of the prospects future business strategy in light of the evolving regulatory environment and changing demands of clients;
3. To increase brand awareness for the client with their target prospects.

The Result

26 appointments made with relevant decision makers, well in excess of the client's expectation.