Client Service Is A Key Differentiator

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Private and retail banks, independent broker-dealers and distributors of investment funds have multiple choices of asset managers to work with on the platforms. Client service can be the key differentiator to help drive an increase of flows to a service provider. Clear identifying characteristics of top-tier service providers include: a) an understanding of the intermediary's business b) responsiveness to requests for information c) transparency and information sharing.

Distributors need their managers to provide superior quality of service even in times of uncertainty. How would you compare the service you receive from the asset managers on your firm’s platforms?

Managers Cited as Providing the Best Service

- BlackRock
- Fidelity Investments
- J.P. Morgan Asset Management
- PIMCO
- T. Rowe Price

Note: Asset managers, listed alphabetically, received 20 or more client citations. Results are from the 2014 Greenwich Associates U.S. Intermediary Distribution Study.

What Distinguishes Top Tier Service Providers?

- Providers with a true understanding of the intermediary recognize the necessity to learn from the bottom up, according to one representative, who further states managers with superior service “build a mosaic and have a good sense of what is going on and how we need to be serviced.”
- Recommending a service provider depends on the manager’s ability to communicate timely, effectively and consistently. If your inquiries or problems are anticipated by the providers, swift action can be taken.

The ability to provide value-added and relevant intelligence.

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