The Future of Institutional Relationship Management

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Executive Summary:

Amid all the time and resources asset managers devote to building “solutions-based” business models, the single most important factor in determining these firms’success is the quality and execution of their relationship
managers. The recent shift in fund sponsors’ focus on holistic portfolio challenges is raising the importance—and financial stakes—of frontline interactions to historic levels.

Relationship manager performance has always been a key driver of success. Greenwich Associates research demonstrates that the quality of a firm’s relationship management team has a direct and profound impact on asset and client retention rates, as well as cross-sale effectiveness. This can be seen in the example below, which tracks total AUM for a group of asset managers experiencing poor investment performance for an extended period of time

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