

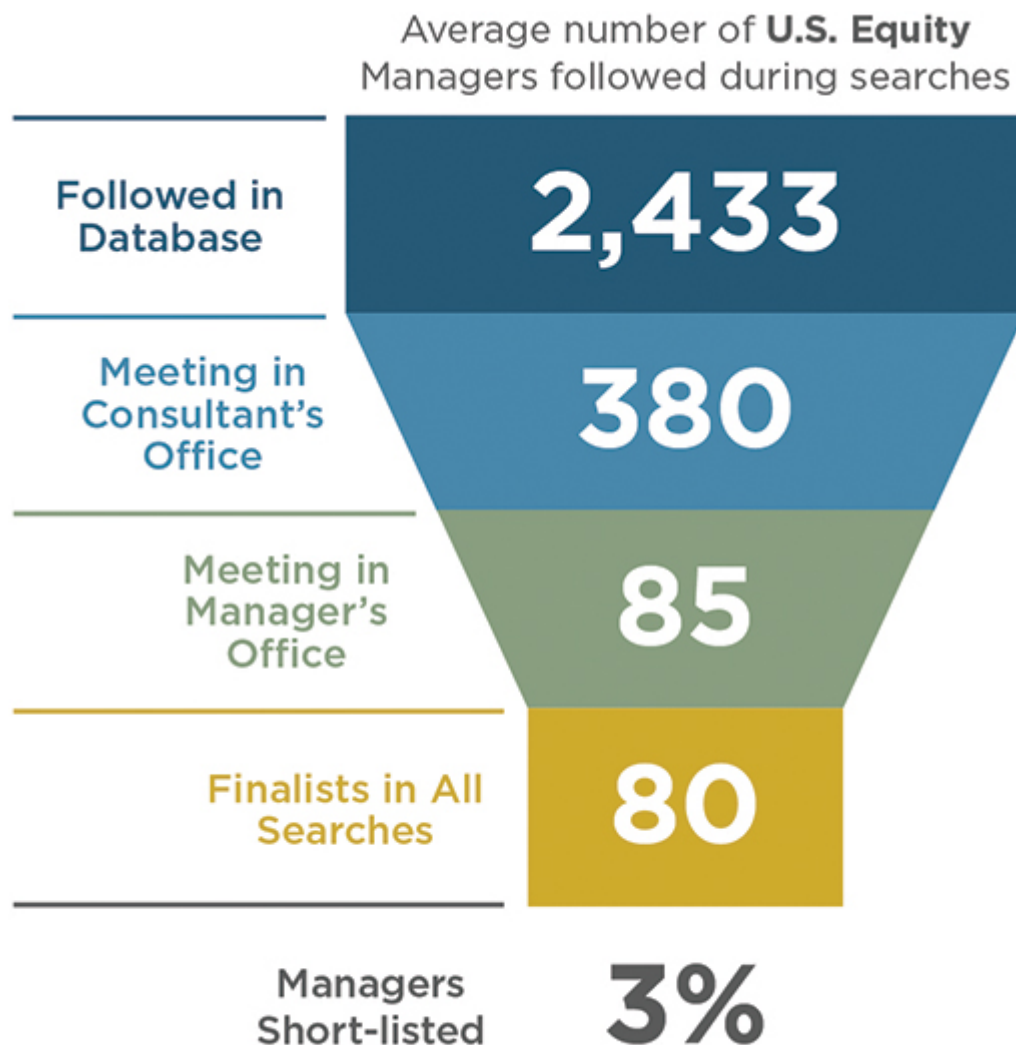
Less Than 10% of Managers are Short-Listed by Consultants

Will You Make it?

March 17, 2016

Formal meetings with investment consulting firms can be make-or-break moments for asset managers. Strengthening relationships with consultants and ultimately winning a prized spot on their selective shortlists hinges on a manager's performance in face-to-face formal meetings.

Our recently released white paper, [Best Practices in Formal Meetings with Investment Consultant](#), helps guide managers through the preparation, execution and follow-up of these meetings.



Source: Greenwich Associates 2014 U.S. Investment Consultants Study

The Bottom Line:

Consultant recommendations to institutional clients are selective and intermediaries only shortlist a small percentage of managers followed in their databases. To gain or retain a spot on these lists, managers need to master the preparation, execution and follow-up.

[*Best Practices in Formal Meetings with Investment Consultants*](#) will help you:

- Pick up tricks of the trade directly from the personal experience of investment consultants
- Better assess and address the specific needs of consultants and their clients
- Learn ways to reinforce your firm's investment philosophy and approach to client centricity

Contact us to access primary data, focused thought leadership pieces and best-practice information to support your business strategy, identify new growth opportunities and drive revenue.



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