Embracing Institutional Investors and Their New DNA

Leverage Unique Segmentation Models to Boost Perceptions of Quality

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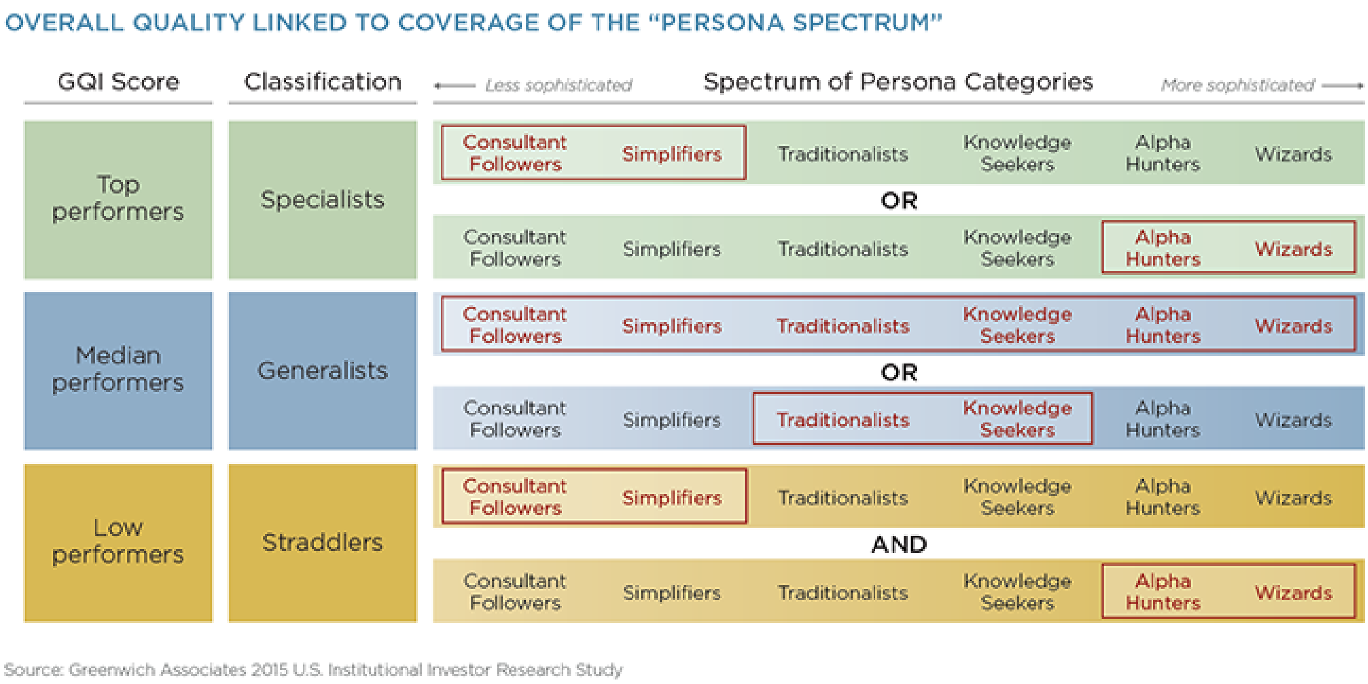
Greenwich Associates uncovered unique insights to help consultants and managers quantify the value of specialization through client segmentation.

Our analysis showed that consultants who focused on serving one end of the “persona spectrum” or the other (the Specialists) typically received higher overall Greenwich Quality Index (GQI) scores.

Conversely, firms with client bases spread evenly across the six persona segments or concentrated within the “middle of the spectrum” categories (the Generalists), or those with client bases equally weighted at both ends (the Straddlers) tended to have lower GQI scores.



Taking Action
Organizations able to nimbly refine their strategies to leverage their strengths and embrace the realities of their business model will have a leg up on the increasingly competitive market.
By carefully determining the optimal prospects, setting clear and realistic expectations, and aligning internal resources to efficiently serve investors, it becomes a win-win situation—making retention easier and b oosting the firm’s reputation in the marketplace.
For specific action steps and a “cheat sheet” for convincing internal teams about the measurable and intrinsic

value of fine-tuning the firm’s client segmentation approach, check out our full report.

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Our suite of analytics and insights encompass all key performance metrics and drivers: market share, revenue performance, client relationship share and quality, operational excellence, return on equity, behavioral drivers, and industry evolution.

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