Digitally Empowering the Front Line: Taking Client Engagement to the Next Level

3.00pm Webinar

- Why do RMs and advisors need better digital tools for their client engagement?
- What are the risks of failing to procure these solutions, and what are the rewards?
- Where is Asia in its front-end digitisation journey compared to for example leading European wealth markets?
- Why is personalisation so much more important today than the broad-brush, more traditional and standardised approaches of the past?
- What digital tools and solutions are out there to help with RM productivity, CLM, CRM, portfolio management and reporting protocols?
- How can data management and analytics help to elevate the skills, capabilities and productivity of the RMs and advisors?
- How do you curate and then manage this data?
- How do you balance and align technology and human interaction for optimum client outcomes?
- The challenges around harnessing technology and automation to improve the client proposition and boost client retention, as well as to help increase AUM and revenues.
- What are the key competitive advantages of solutions that will help deliver greater client centricity, personalisation and client satisfaction?
- What is coming next?

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4.00pm Webinar Ends