

Top 10 Reasons to Automate Presentation Creation and Client Reporting Processes

- 1. Errors in client reports and prospect presentations expose your firm to reputation and regulatory risk.** Have you considered the risk to your reputation of clients or prospects seeing errors in your reports and presentations? Have you thought about potential regulatory actions, including hefty fines and penalties, that could result from the dissemination of erroneous information?
- 2. Look-and-feel, consistency, and quality in your reports and presentations convey the right image about your firm.** Do your client reports contain different fonts, colors, headers/ footers, etc. due to collating material from different systems?
- 3. You can provide more than representative portfolio data to clients.** Are you providing representative (model portfolio) performance, sectors, attribution or characteristics due to the burden of providing actual portfolio data to each client? Do your clients know that they are receiving representative portfolio data instead of their own portfolio information?
- 4. Clients are requesting more robust data than ever before.** Clients – especially institutions – need more information and greater transparency. When clients request more data, do you look at it as a burden because of the work involved, or do you see it as an opportunity to better serve clients and enhance the relationship?
- 5. Clients recognize the value of better, more detailed portfolio data.** The best portfolio managers and client service teams provide attribution, characteristics, and other in-depth portfolio data proactively – not just to select clients or those clients who request it.
- 6. Private clients want different information than institutional clients.** Are you providing the same institutional reports containing in-depth characteristics, sector analysis and attribution to private clients who often want summary portfolio information?
- 7. Portfolio managers can spend their time more productively on client service and business development, not reviewing and editing reports.** Are personnel in your firm copying data into Excel, editing the data, and then inputting into Power Point or Word? Are highly paid portfolio managers spending too much time correcting manually-created client meeting books and presentations?
- 8. Reduce time spent responding to client requests.** Does it take too long to respond to client requests for portfolio information? Would you like to consistently deliver portfolio information more quickly to clients – such as your monthly or quarterly account statements?
- 9. Greater efficiency and scalability enables asset management firms to focus on growth.** Are you forced to add more people as your assets and clients grow? Do you wish you had additional marketing, sales and client service resources without the cost?
- 10. Managing investments and retaining and accumulating client assets are what you do best.** Do you wish your portfolio management, marketing, and client service staff had more time to develop new business and proactively service clients? Is your staff spending too much time on report administration instead of sales and client service?

If simply retaining or adding \$10-20MM of assets per year would pay for technology that solves the above issues, would you be interested in automating the presentation creation and client reporting processes?

If the answer is yes, please contact Marc Filipkowski to learn more about how Assette can improve the presentation creation and client reporting processes at your firm.

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