



Investech Solutions for Consultants and Advisors



The New Business As Usual: Are You Ready?

It's a new era for consultants and advisors. This resource outlines 4 benefits from technology-based solutions that drive better and more efficient client servicing in the new business as usual.

The New Business As Usual: Are You Ready?

As we struggle with what a post-pandemic era looks like for institutional consultants, one thing is clear: we're not going backward to old routines.

Ways of servicing clients have changed. Innovative firms have found virtual investment committee meetings offer great benefits. Reduced travel and increased attendance have paved the way for technology to play a key ongoing role in the service model for institutional consultants.

Is your company poised to thrive? Technology-based solutions offer consultants the opportunity to take advantage of key trends and provide better and more efficient client servicing in the new business as usual:



Less Travel

For many of us, Zoom is now a household name. Virtual meetings have allowed us to be face-to-face from anywhere. Meeting attendance rates have never been higher as people form important relationships online and embrace remote decision-making.

Do clients really want to see you in a conference room every quarter? Adopting a hybrid meeting cycle that includes ongoing virtual meetings and reduces in-person meetings cuts down on costly travel and saves a ton of time for consultants (and clients).



More Client-Friendly Reporting

The key to efficiently servicing clients is through digital investment reviews and presentations that can be updated instantly, delivered at no cost, accessed easily, and are simple to archive. Clients can review their investment programs when and where it's convenient for them.

Paper reporting has gone the way of the fax machine; the time has come to stop the paper waste and level up client reporting.



Differentiated Communications

With most of us suffering from constant information overload, investment consultants must keep their communications relevant, easy to consume, and differentiated. Modern technology allows consultants to move beyond written papers and emails and communicate with clients in new, scalable ways. Video communications are increasingly the way people want to learn and be informed. If you are not yet using videos to share information with clients, you really should consider it.



Broader and Deeper Client Engagement

Virtual interactions between consultants and clients enable more participation and broader engagement on both sides of the table. Video conferencing makes it much easier than in-person meetings to tap colleagues and partners to join presentations and discussions with clients. Digital reports and video updates with in-house experts also help showcase a consultant's strength and improve client service.

Consider all the ways to tap team members and specialists to be part of the client relationship.

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It's a New Era for Consultants and Advisors. Need Help Getting Ready?

The model for consultant-client relations is rapidly changing. Now is the time to embrace the opportunity to take advantage of key trends that allow consultants to modernize their client service.

eVestech is the virtual communication hub designed for investment consultants, advisors, and their clients. See how eVestech partners with leading investment firms to power their client engagement and communication and help drive a stronger advisor/client relationship.

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