

Elevating client communications



OPPORTUNITY

The Canadian subsidiary of one of the world's largest multinational investment companies was seeking to elevate their conversations with clients above the usual fact sheets and style box reports. They wanted a tool that was easy to use and could help their sales teams differentiate themselves and their products with their financial advisor clients.



SOLUTION

We created a bespoke sales enablement module that integrates our Barra Optimizer and Barra Factor Analytics into WealthBench; allowing their wholesalers to generate custom proposals and facilitate conversations about factor investing, stress testing, and optimization in a way that is unique in the retail world.



OUTCOME

This enabled their wholesaler teams to quickly create visually dynamic presentations that helped create meaningful conversations with their clients around their portfolios helping them make more informed decisions and differentiating their product.

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 **Powering better investment decisions.**