

Helping Clients Succeed

Featuring:

Pam Haller, *Head of Client Success & Solutions, MSCI*

Q:

Where is the industry heading when it comes to driving client success?

Pam Haller:

Client success involves understanding their evolving needs, and delivering your products and services such that they achieve their desired outcome, results and experience. The technology industry is driving client success by empowering client organizations to be better informed about the needs of their client, such that any interaction is effective and viewed as value-add engagement.

At MSCI, our client organization leverages the aggregate information about a client: their profile and their interaction with our products, services and support teams. Through big data technology, a significant volume of information is transformed into relevant, client-specific information, and made directly accessible to our client teams. The information influences the valuable insights delivered during a client engagement. This information is also used to provide further insight into the client segments which, in turn, drives our best practice discussions. Big data technology is driving client success through the timely delivery of information to our client teams, which transforms the interaction into a highly efficient and collaborative client meeting.

Q:

What does client success mean to MSCI?

Pam Haller:

At MSCI, client success is measured by the retention and longevity of our global client base. And retention is rewarded when clients achieve their desired outcome. Within the investment community, clients adopt technology and product features at various rates, and client success to MSCI means supporting the clients' journey through these transitions. Throughout the engagement, a client's investment and technology requirements evolve, and MSCI has the expertise and the solutions to adapt and enhance the client experience to meet those needs at scale. Whether it is researching a new benchmark index, emigrating client portfolios as part of a custodial transition plan or supporting the transition to cloud technology, MSCI gathers a highly skilled team of experts to help our clients realize a successful outcome. MSCI offers clients the capability to integrate their unique technology ecosystem with Enterprise products and services to achieve their operational targets.

Q:

How is MSCI driving client success?

Pam Haller:

One of the ways we are driving client success at MSCI is by making our content and services more accessible to our clients. Through our technology partnerships we have established a Data Lake and catalog of MSCI content, in which our clients can explore the richness of MSCI's data, download samples to review, and reach out to our support team for more information. This same content is also accessible via marketplace partnerships, should a client have an established relationship and preference for distribution.

With our order management system partnerships we deliver integration and collaboration opportunities through MSCI's developer community: a host for MSCI's data and analytics APIs. Within the developer community one can explore MSCI's capabilities, including test-driving an API or reaching out to enquire about further support. Through these new technology distribution options, MSCI is driving client success by distributing content and services to the technology platforms our clients choose.

Q:

How do the people MSCI brings in support client success?

Pam Haller:

The people MSCI brings in are those intrigued by the investment process, and those willing to challenge the status quo. They are curious about our clients, and how our products and services assist clients with differentiation to achieve their own success. To a client engagement, MSCI will bring the right skills for the challenge presented by our clients. Whether it is someone from research, technology or product development, MSCI supports client success by identifying the right team to assist our clients as they leverage our products and services to achieve their own success.

Q:

How does MSCI's support differ from competitors'?

Pam Haller:

We provide MSCI expertise. These are our people, our employees, and we pride ourselves on it. And it is not just the talent that we bring in, but how we grow our employees to influence and assist our clients' success. Not only do they bring their expertise, from research to account management to

technology, but our employees grow and transform with our clients; they are there throughout our clients' journey.

About MSCI

MSCI is a leading provider of critical decision support tools and services for the global investment community. With over 50 years of expertise in research, data and technology, we power better investment decisions by enabling clients to understand and analyze key drivers of risk and return and confidently build more effective portfolios. We create industry-leading research-enhanced solutions that clients use to gain insight into and improve transparency across the investment process. To learn more, please visit www.msci.com.

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