

# Consultant Relations – Aligning Sales Strategies to Maximize Impact Across Consultant and Asset Owner Channels

Competitive Challenges Conference Presentation

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Executive Summary:

Institutional asset management requires adept navigation of complex sales dynamics. Enter the consultant relations expert, who is tasked with engaging investment consultants, and the relationship manager, who is responsible for cultivating direct relationships with asset owners. Success lies in the alignment of these roles, ensuring a seamless and collaborative approach that respects the intermediary role of investment consultants while nurturing direct connections with asset owners.



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