

Client engagement and the delivery of digital advice

3.00pm

Client engagement and the delivery of digital advice

- How can digital technologies help private wealth management firms better engage with their clients?
- How can the advice be made more relevant, more informative, more tailored and more engaging?
- Where is robo-advisory best targeted, only at the retail/mass affluent, or potentially towards the HNW community as well?
- How can robo-advisory, language processing, enhanced data, state-of-the-art analytics, AI, and machine learning come together to improve client engagement and the efficiency and capabilities of the forward-facing advisors?
- How do the private banks decide what solutions to acquire, and then how to work with the FinTechs and other digital solutions providers?
- Having committed to spend, how do they ensure they are getting what they bargained for, and achieving value for money and a significant advance?
- Do banks and firms buy one product/solution or take a more modular approach?
- Do these banks and firms buy only the solution, or do they also farm out the operation and servicing of the solution?
- What does the digital bank of tomorrow and asset management firm look like, and will digital solutions, engagement and advice be allied to a genuinely more client-centric approach?
- How has Covid-19 affected the future direction of tech / digital?

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4.00pm

Webinar Ends