

Digital wealth: automation, deployment, engagement

Speaking at Hubbis' Digital Wealth event in Singapore in June – John Robson of Quantifeed discusses how to fit a new technology initiative into the people, processes and systems of existing businesses.

Financial institutions across Asia are now looking at robo-advisory platforms as offering the opportunity to automate more and more with the integration into the total wealth management experience becoming a reality, says John Robson, chief commercial officer at Quantifeed.

The common threads that ties all type of organisations together are that they want to go from selling products to solving their clients' financial problems.

To achieve this requires financial services firms to offer customisation (not segmentation), convenience and relationships based on ongoing value, explains Robson.

While firms have the customers, the data and the products, they need to understand how to deliver financial solutions that treat every client in a way that is scalable. This requires them to automate more of the wealth management experience – needs analysis, portfolio construction, investment fulfilment, rebalancing and micro communications.

The deployment challenge, says Robson, is not a technology problem, but rather an issue of finding the solution that makes the technology service the organisation.

Indeed, implementing a robo platform is about aligning the new technology to the existing business and its people.

For example, portfolio construction and asset allocation approaches need to be compatible to the investment advisory model. Suitability and risk profiling also need to be consistent across channels. Yet successful deployment is beginning of the story, not its end.

Digital engagement with clients provides the opportunity to learn from their behaviour, to learn what's working and what isn't, and to continually refine that engagement as well as other aspects of the product. If the engagement is right, then the opportunity exists to shift from a relationship based on transactions to one of on-going value. ■



JOHN ROBSON
Quantifeed

[Link to Event Agenda](#)

[Link to Speaker Biography](#)

[Link to Presentation Slides](#)