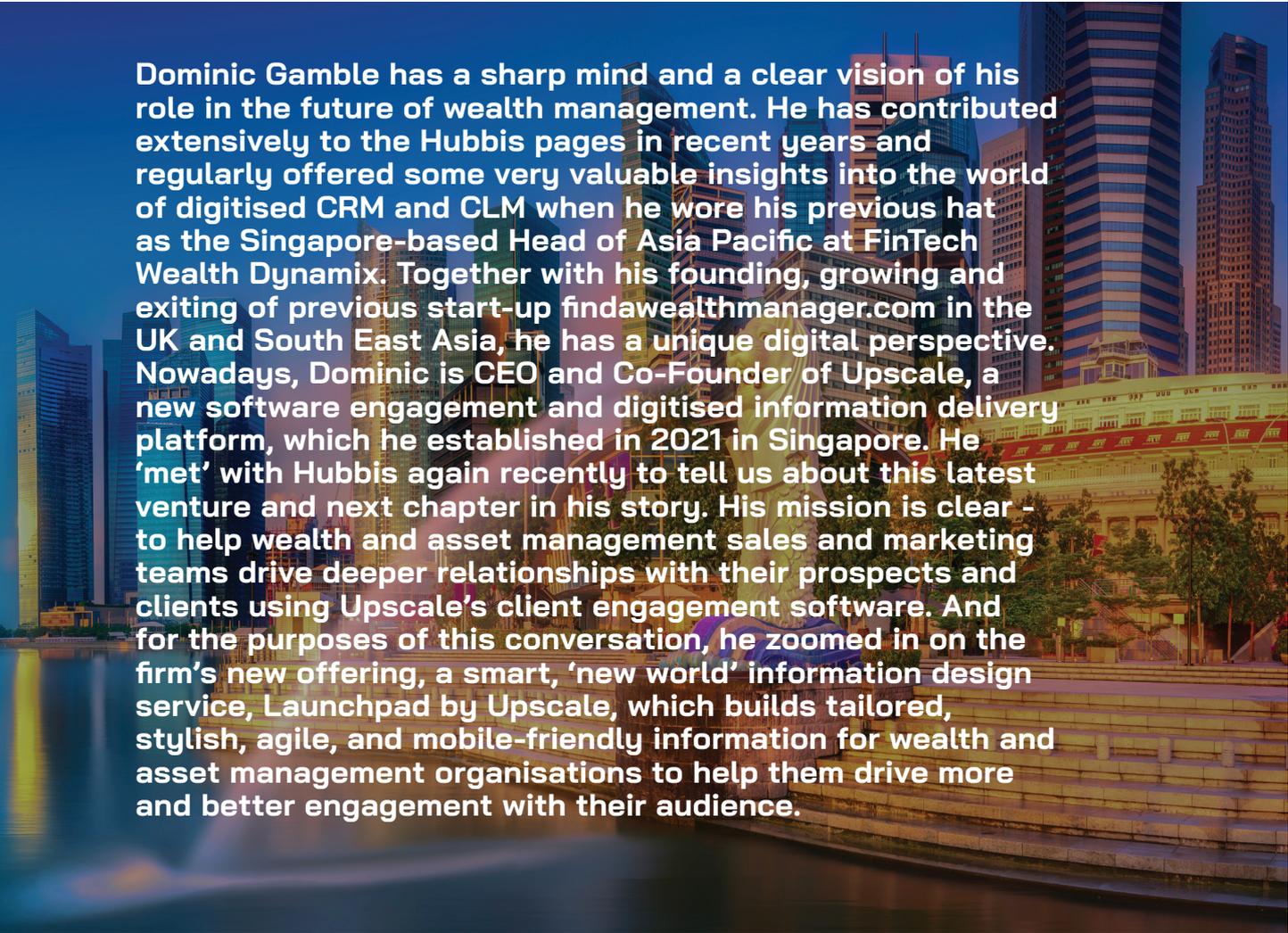


Upscale's Launchpad – The New World Information Solution for Sales & Marketing in the Digital Age



Dominic Gamble has a sharp mind and a clear vision of his role in the future of wealth management. He has contributed extensively to the Hubbis pages in recent years and regularly offered some very valuable insights into the world of digitised CRM and CLM when he wore his previous hat as the Singapore-based Head of Asia Pacific at FinTech Wealth Dynamix. Together with his founding, growing and exiting of previous start-up findawealthmanager.com in the UK and South East Asia, he has a unique digital perspective. Nowadays, Dominic is CEO and Co-Founder of Upscale, a new software engagement and digitised information delivery platform, which he established in 2021 in Singapore. He 'met' with Hubbis again recently to tell us about this latest venture and next chapter in his story. His mission is clear - to help wealth and asset management sales and marketing teams drive deeper relationships with their prospects and clients using Upscale's client engagement software. And for the purposes of this conversation, he zoomed in on the firm's new offering, a smart, 'new world' information design service, Launchpad by Upscale, which builds tailored, stylish, agile, and mobile-friendly information for wealth and asset management organisations to help them drive more and better engagement with their audience.

GET IN TOUCH

[View Dominic Gamble's LinkedIn Profile](#)

[Find out more about Upscale](#)

“In my previous roles as a private banker and then in digital solutions for the wealth industry, I have seen first-hand how the material that wealth managers, asset managers and other advisors deliver to their prospects or clients is at best average, and at worst, pretty awful,” he begins. “We are tackling this issue head-on with our Launchpad solution.”

Today, he elucidates, customers are very well versed in using digital and technology platforms for a wide range of their daily activities, and everyone is consciously or subconsciously aware of good and bad design. This is now a global phenomenon, transcending age, gender, wealth and geography.

The new world needs the ‘new school’

“Imagine as a private client you are receiving quite old fashioned, clunky-looking documents that you cannot open on your mobile phone, that are tough to comprehend and assess - this is a big drag on the client experience and that’s bad for business”, he observes. “Clients do not want hard to comprehend ‘gobbledygook’ on a regular basis; it looks bad, and it creates a poor impression. It slows down building trust and comfort, it takes the shine off an introduction from a reputable source, it diminishes the good vibes that were built when they met face to face. What does this mean? Let’s be more tangible: revenue is achieved slower, is worse quality revenue and the key stakeholders from either side are not building that deep, long term relationship which surely is in everyone’s interests.”

He says the bottom line is that sales and marketing collateral needs to have a consistent

and modern feel that a client will appreciate, and that will be a facilitator rather than an impediment to their engagement with the organisation.

Converting good design to revenues

Accordingly, Upscale has established a design service called Launchpad to address exactly these challenges. “We have put together a design team of experts who are experienced in the wealth and asset management sector; alongside me and the rest of the management team, we help organisations cost-effectively

“Clients do not want hard to comprehend ‘gobbledygook’ on a regular basis; it looks bad, and it creates a poor impression. It slows down building trust and comfort, it takes the shine off an introduction from a reputable source, it diminishes the good vibes that were built when they met face to face. What does this mean? Let’s be more tangible: revenue is achieved slower, is worse quality revenue and the key stakeholders from either side are not building that deep, long term relationship which surely is in everyone’s interests.”

and rapidly move to market with new and better-looking sales and marketing collateral,” he reports. “We are highly confident this will have a major positive effect on prospecting and client relationships, and that will flow through to more business. The science behind the positive impact of good design on business is not our discovery. There is a large body of research that highlights its power, for example McKinsey’s ‘Business value of design’ project showed that companies with top-quartile Design Index scores outperformed industry-

benchmark growth by two-to-one. Just look through your Instagram feed and dissect posts and adverts to see just how much good design has permeated our lives.”

Launchpad is now live and already has what Dominic describes as ‘a large number’ of customers, including some of those using some of the Upscale software modules.

“This is already seen as a vital service,” Dominic reports. “Wealth and asset management experts base their expertise on providing advice and building relationships; they are not experts, nor do they profess to be, on the design and

presentation of the information they are communicating to their customers. Time spent on that is really both a waste of money and a deviation of focus.”

And then there were four

He explains that Upscale is the company, and Launchpad is one service that is offered. “We have four solutions, or as we call them “modules” in Upscale, and Launchpad is one of them specific to wealth and



DOMINIC GAMBLE

Upscale

asset management,” he reports. Our strapline is ‘Launchpad by Upscale’, but it is important to appreciate this is just a design solution, whereas the other three of our modules are software.”

He adds that the software is focused around engagement. This inevitably means Upscale’s customers are uploading all of their sales and marketing collateral and a lot more into the Upscale system, and the Launchpad design module fits neatly alongside the core thrust of the business.

Addressing a genuine need

“While our three software modules can work magic on client engagement, if your sales and marketing collateral is dreadful, then you are not going to get quite as much magic from our system as is possible,” he explains. “This new design module comes out of the discussions and engagement we have had with actual clients who see a real need for our design support. In fact, the demand has been so strong that we have fast-tracked launching this publicly. And it is worth noting

Key Priorities

Dominic rounds off the conversation by defining his key mission for the foreseeable future. “For Upscale, we are focused on growing our early customer base in Asia and North America and continuing our product rollout”, he reports. “Launchpad is becoming a key part of this proposition, developing from a solution for financial advisors and external asset managers, to a wider SME customer base. The clients we already have outside of wealth and asset management, from broader financial services and consultancy, to crypto as well as technology and SaaS scale-ups, tells us we are really on to something here.”

“We are driving them forward to the ‘Wow’ factor. Information suddenly becomes differentiated, it is more engaging, more digital and mobile-friendly, far less old school. And through our software, we also provide real-time analytics on how the recipients engage with what they receive, rather than continually flying blind. We’re excited because with all the digital transformation talk, we have tools here that genuinely drive more and better business, without the digital transformation budgets and timeframes which are hurdles for organisations both large and small!”

that customers do not need to be Upscale software clients to use the Launchpad service. Of course, that would be a great outcome in the long term, but it is not a prerequisite to get going.”

He offers more detail, noting that part of the mission is to make the process as pain free as possible. “Our clients in insurance, asset management and wealth advisory typically waste hours and days tinkering with very messy slide decks, often involving senior management time too. Put a value on that time - it’s very expensive! Then

they hunt high and low for reliable external parties such as agencies or freelancers to help them, often producing headaches, more wasted time to hand-hold, and poor outcomes,” he says.

“But we streamline it all, thereby freeing up their time for what they are best at. The output is great-looking, digital savvy material that can drive deeper engagement with their clients. Better still, we’re also experts in the industry so we know the limitations and the terminology. Other design professionals really struggle to comprehend these nuances.”

The wealth industry as the core market

Dominic provides some further insight into the formation of Upscale. He explains he and Ben Backx created it together in 2021 as a B2B sales engagement software solution. "Ben is a serial enterprise bank technologist and expert in deep-tech personalisation. We have zeroed in on wealth and asset management as our home market," he reports. "As we launch our software publicly over the coming months you will be hearing a lot more about us."

As to the big picture perspective, Dominic comments that the wealth and asset management industry has a significant opportunity to improve the way they engage with prospects and clients.

Helping deliver the 'Wow' factor

"We are driving them forward to the 'Wow' factor," he says. "Information suddenly becomes differentiated, it is more engaging, more digital and mobile-friendly, far less old school. And through our software, we also provide real-time analytics on how the recipients engage with what they receive, rather than continually flying blind. We're excited because with all the digital transformation talk, we have tools here that genuinely drive more and better business, without the digital transformation budgets and timeframes which are hurdles for organisations both large and small!"

Dominic likes to refer to RMs and all types of client-facing bankers and advisors as 'salespeople', which seems to fly in the face of an industry trend towards a more nuanced, less product-driven and more client-centric model.

Embracing the 'S' word to enhance client centricity

"Yes," he says, "over the 20 plus years I have been involved, the 'S' word has become marginalised, even somewhat spurned, but I view the definition of sales in a slightly more binary way. If you are providing a solution or service and there is revenue coming as a result, that to me is sales. We shouldn't be ashamed of that."

Further than that, he says the industry needs to embrace this and instead of shunning the label, get smarter about sales and see the optimal approaches as core to delivering the clients the best ideas, the best solutions and having them engage with those through the best possible ways. "We are really helping drive the client centricity and recognising that the endgame is high quality revenue," he states. "Product pushing sends shivers down our spines. Adding story-telling, better sales practices and deep personalisation transforms bad quality to good quality. And that's what our software is doing, whether that be empowering face-to-face sales and relationship building or via digital channels."

Dominic ponders the question as to whether the industry truly cares about these ideas of better engagement.

Playing catch-up

"To answer that one needs to assess why the wealth industry is quite noticeably behind what you might receive from other touchpoints like luxury goods, property, travel," he comments.

"We need to up the game and help shift the industry away from being a 'to-do' item a long way down an individual's checklist to a more engaging, inspiring, enjoyable, dare we say 'fun', and a must-do priority. These advances will inspire better rapport between the organisation and customers." Their view is reinforced by numerous consultant reports stressing the importance of organisations investing in customer experience and engagement. "I started my first wealth-tech business in 2011 and I'm always amazed at how many start-ups have great ideas but don't actually solve any current day problems. In our case, it's crystal clear there is an industry problem in engaging prospects and clients. We hear it, we experience it, we've even done it! And all this is amongst a backdrop of 7x higher digital content consumption post Covid vs pre Covid, which is another driver compelling organisations to evolve in this area." (Oliver Wyman data).

Yet wealth management intermediaries struggle to make the leap, he says. "They don't know how to go about it, they think it will cost a fortune, they don't usually know who can solve these issues, and they end up doing very little," Dominic reports. "But Launchpad is a one-stop-shop and with solutions starting at just USD150, and it can strip away many of those barriers. Not to mention provide a real competitive advantage in industries that are homogenised and different to stand out like IFA and EAM world." ■