

Are you future-proofing yourself?



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WHAT WE KNOW

WHERE WE ARE AT

WHERE WE ARE HEADING

INFLECTION POINT

TECHNOLOGY

- Cloud Technology
- 3D Printing & Advanced Manufacturing
- The Internet of Things
- Automation, Robotics
- AI & Machine Learning
- Wearables

- Blockchain
- Virtual Assistants

INTERACTIVE DATA LAYER



AUGMENTED HUMANITY

- AI Board Directors

- AI adaptive systems that anticipate needs

- Rise of the Individual
- Personas

HUMAN

DISRUPTIVE TECHNOLOGY



BIG DATA MANAGEMENT



Predictive Analytics



- Rise of the Free Agent
- Multi-generational Workforce
- Longevity

- Pay Equity
- Vocality of the Female voice

Building awareness

Getting organized

Starting to accelerate

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From no-tech, to low-tech, to Fintech ...



“What if we don’t change at all ...
and something magical just happens?”

Are you ready?

HNWIs across the globe continue to demand hybrid advice. HNWIs maintained their interest in the hybrid advice model, as first highlighted in 2017 *WWR*, with more than 50% globally saying it was highly important in Q1 2018.

Hybrid advice forms a critical top-line growth enabler for firms, with 68.7% of HNWIs globally indicating hybrid advice was a significant factor regarding decisions related to asset consolidation with the primary wealth management firm.

*Source:
Capgemini World Wealth Report 2018*

Trust me – I'm not a robot

Figure 29. HNWI Propensity to Use BigTech Firms for Wealth Management, Q2 2017



Note: Question asked: "If technology firms such as Google, Apple, Facebook, or Amazon were to offer wealth management services, would you consider becoming a client? Please indicate response as Yes or No"

Source: Capgemini Financial Services Analysis, 2017; Capgemini Global HNW Insights Survey 2017

“It’s not the strongest of the species that survives,
nor the most intelligent, but the one most
responsive to change.”

Charles Darwin, 1809

Trust, reliability and *relationships*
are the new competitive advantages.

Relationships rule

... or do they?

Where are you in the hearts & minds of your clients?

Better personal connections between wealth managers and their HNWI clients may lead to better HNWI satisfaction scores. In 2018, only **55.5%** of HNWIs said they connected “very well” with their wealth managers.

Source:

Capgemini World Wealth Report 2018

‘The ability to be human will become increasingly valuable in the age of AI, **only if** you can master the human skills that differentiate you from a machine.’

Geoffrey Colvin
Humans Are Underrated

Uniquely human skills

Empathy

Communication & questioning

Imagination & vision

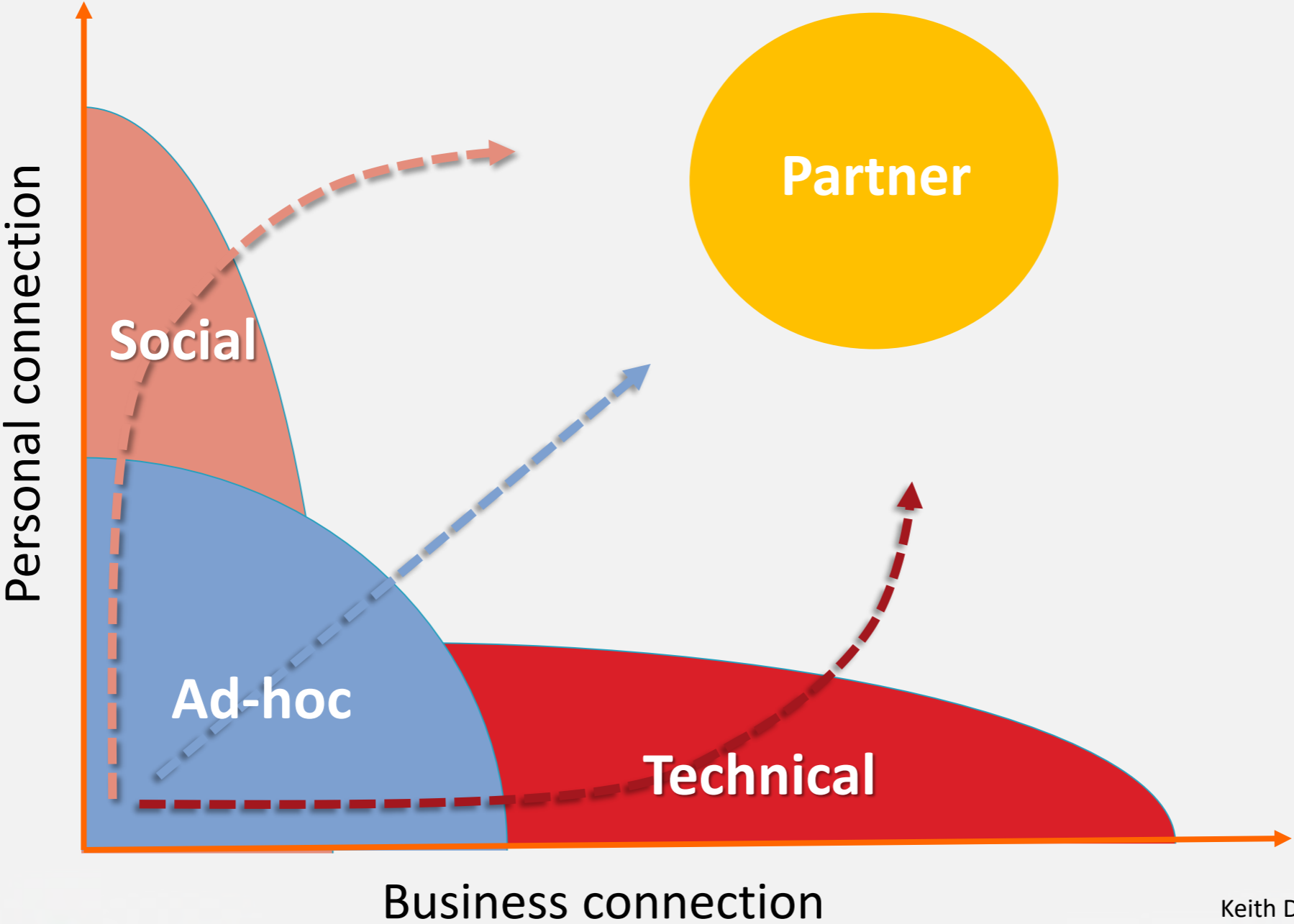
Critical thinking

The key self-test question is What's your strategy and plan to develop these skills & competencies so that you remain relevant to your clients?

Selling isn't about 'solving problems' or 'providing solutions'.

Selling is *influencing change* - influencing people to change.

Why you?



Source: *Smarter Selling*,
Keith Dugdale & David Lambert

In summary

Change your reality, and the buying experiences of your clients.

Be more perceptive of the relationship needs of others.

Establish what human value each of your clients needs – and deliver it consistently and professionally.