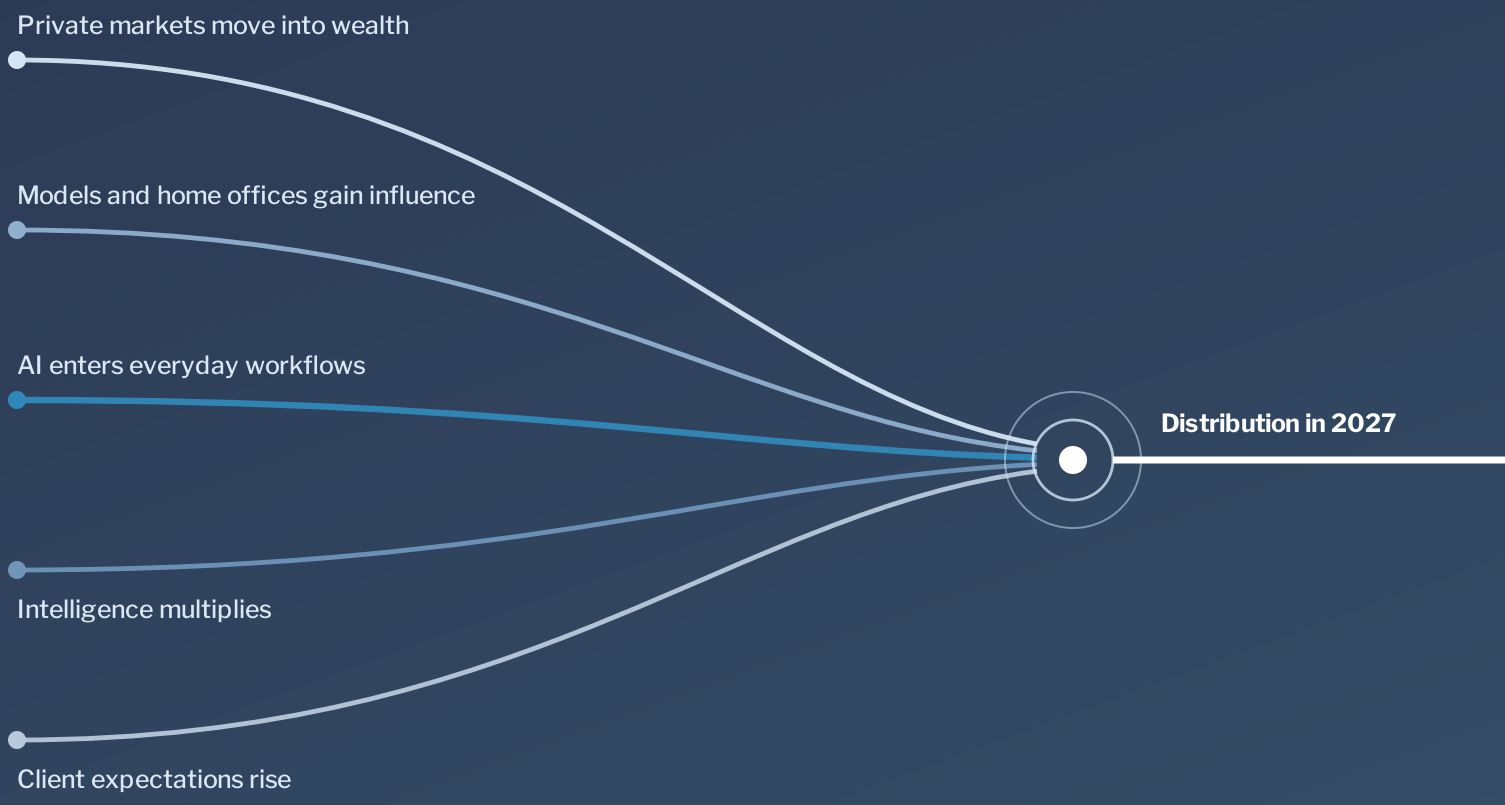
Olmstead

2027 Asset Manager Distribution Perspective

Five assumptions distribution leaders should challenge in 2027

Investment managers have spent millions modernizing distribution. What if they modernized the wrong model?



Introduction

Distribution isn't facing another technology cycle.

It's facing a structural change in how products are allocated, decisions are influenced and work gets done.

Entering 2026, we argued that the distribution conversation had changed.

After years of investment in CRM, data platforms, analytics and AI, managers were no longer simply asking what else they could implement. They were asking why what they already had didn't work more effectively.

Trusted data was becoming non-negotiable. Visibility needed to become activation. AI was exposing weaknesses in the foundation. And increasingly similar technology stacks were producing very different outcomes.

Our conclusion was simple: **inefficiency was inhibiting the buildout of necessary scale.**

Entering 2027, the stakes are higher. The environment those investments were designed to support is itself changing.

Private markets are moving deeper into wealth. Model portfolios, home offices and centralized investment teams are exerting greater influence over portfolio construction. AI is moving from experimentation toward everyday distribution workflows. And managers have access to more data and intelligence than ever before.

At the same time, client expectations are moving in a different direction. Digital access, personalization and more immediate, contextual engagement increasingly shape what clients and advisors expect from their managers. The experience is no longer defined by a portal, report or meeting in isolation—but by how easily those interactions connect across the relationship.

The forces reshaping distribution

- **Private markets** are moving deeper into wealth
- **Models and home offices** are shaping portfolio construction
- **AI** is entering everyday distribution workflows
- **Data and intelligence** are more plentiful than ever
- **Client expectations** for digital, personalized and connected experiences keep rising

2026 Scale

Inefficiency was inhibiting the buildout of necessary scale.

2027 Agility

Adaptability becomes non-negotiable.

A theme for 2027

Scale and Agility

Two ideas run through this paper. Scale got distribution here. Agility will define the leaders.

Scale

Efficiency, scalability and productivity

Expanding output, client reach and footprint by maximizing existing resources and building repeatable structures.

What it looks like in distribution

- Standardized platforms
- Repeatable processes
- Broader coverage
- Lower cost to serve

Agility

Adaptability, flexibility and nimbleness

Maintaining the speed and flexibility to pivot, redirect resources and innovate quickly as conditions change.

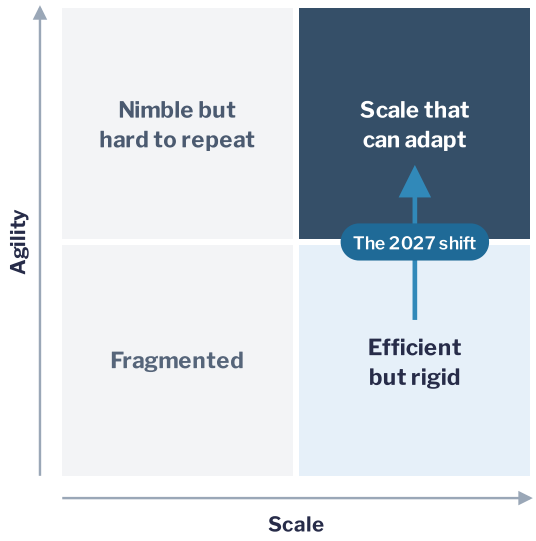
What it looks like in distribution

- Faster response to change
- Rapid innovation
- Reconfigurable workflows
- Redirected coverage

Scale and agility aren't opposites. Much of the past decade's distribution investment—CRM, data platforms, analytics, enablement—was about scale: reaching more clients, more consistently, at a lower cost to serve. That work mattered, and our 2026 perspective argued it was still unfinished.

But scale is usually built for a known model. It standardizes what is expected to stay the same. When products, portfolio construction, centers of influence and ways of working all change at once, structures built only for scale can become the thing that slows distribution down.

The goal for 2027 isn't to trade scale for agility. It's scale that can adapt.



How to read the five assumptions

Built for scale
How the assumption plays out when distribution is optimized for scale.

Built for agility
What changes when distribution is built to adapt as conditions shift.

There is precedent for this kind of change.

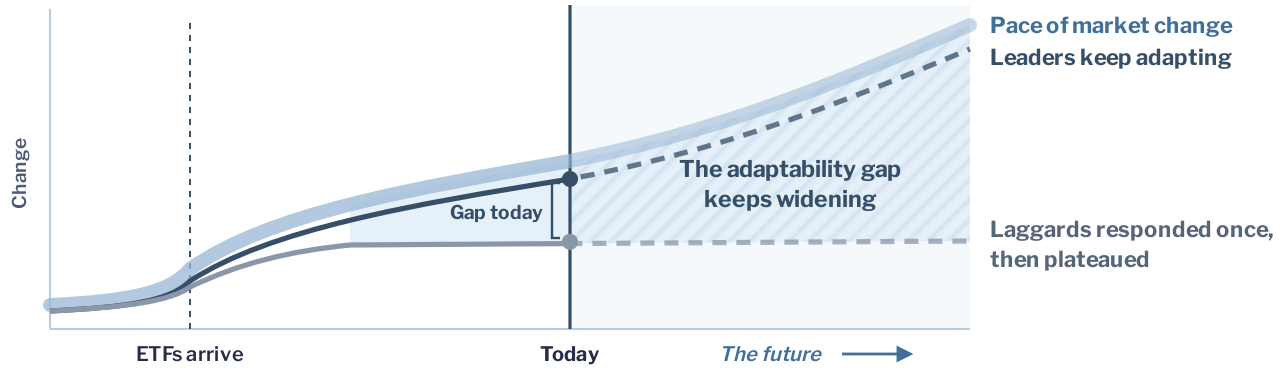
The rise of ETFs was initially easy to view as product and wrapper innovation. But their impact ultimately extended much further—changing portfolio construction, accelerating fee pressure, increasing the influence of platforms and models, and forcing traditional managers to rethink how they competed and distributed their capabilities.



How the ETF shift played out for traditional managers

> *The lesson wasn't simply that a new product structure gained share. It was that changes in how portfolios were built eventually changed how managers needed to distribute.*

Leaders and laggards read the same change differently



Laggards treated it as a one-time event

They added products, defended the existing model and waited for the market to settle. The response fit the moment, but change kept coming. The gap is wide today and will keep widening.

Leaders expected change to keep accelerating

They designed for where portfolio construction was heading, not just where it was, and built an operating model that could keep adjusting as models, platforms and pricing evolved.

Private markets moving into wealth shouldn't be assumed to follow the same path. But the pattern is worth paying attention to, and this time the change is bigger and faster. The ETF shift was largely one force, playing out over many years. Today several forces are arriving at once, and the time to respond is shrinking.

That magnitude and speed call for more strategic thinking about how you build for the future, not only how you respond to the challenge in front of you.

What is different is that they are beginning to collide.

On their own, these developments aren't new. Together, they change what distribution has to adapt to, and how quickly.

Alternatives are expanding the investable toolkit at the same time that models and home offices are gaining influence over how that toolkit is assembled. AI is changing how work gets done, and client expectations keep rising. Each shift makes the others harder to absorb one at a time.

And the lines between product, technology, data, sales and client experience are blurring



Two ways to respond when forces collide

Built for scale
Treat each shift (ETFs, private markets, models, AI) as a separate event to absorb into the existing model.

Built for agility
Treat change as continuous, and design distribution to keep adapting as these forces interact.

The question for distribution leaders in 2027

Are the assumptions that shaped today's distribution organization still the right assumptions for the market that's emerging?

Summary

Five assumptions at a glance

Each assumption made sense in a distribution model built for scale. All five are shifting at the same time.

All five are shifting at once

	The assumption, and what may be true instead	Built for scale	Built for agility
1	*"Alternatives are another product opportunity."* **They may reshape wealth distribution itself.**	Fit private markets into the distribution model you already have, whether it was built for traditional products or institutional clients.	Reshape coverage, education, platforms and servicing around public/private portfolios as they evolve.
	The 2027 challenge: Are you fitting private markets into the distribution model you already have—or preparing distribution for an increasingly public/private portfolio?		
2	*"Winning the advisor means winning the assets."* **The center of distribution influence is moving.**	Grow coverage: more advisor touches, more meetings, more reach.	Point wholesaler and home-office effort at where allocation decisions are made, and follow influence as it moves.
	The 2027 challenge: Does your distribution organization know as much about the portfolios it's trying to enter as the advisors it's trying to reach?		
3	*"AI transformation starts with AI."* **For some managers, the AI problem won't be an AI problem at all.**	Use AI to do today's tasks faster and at higher volume.	Build an AI-enabling foundation across people, process, technology and data: trusted data, clear ownership and an AI strategy that makes AI a superpower for everyone.
	The 2027 challenge: If you activated your highest-value AI use case tomorrow, would your distribution architecture actually be ready?		
4	*"More intelligence creates better decisions."* **Distribution may have reached peak dashboard.**	More dashboards, reports, scorecards and data coverage.	Activate signals inside the workflows where people act, with a clear owner and next step.
	The 2027 challenge: If your teams still have to find the insight, interpret it and determine what to do next, how intelligent is your distribution architecture?		
5	*"Modernizing technology modernizes distribution."* **Your operating model may now be the constraint.**	A modern, standardized technology stack.	An operating model that can reconfigure coverage, workflows and decision rights across that stack.
	The 2027 challenge: Have years of technology investment created a more adaptable distribution organization—or simply a more sophisticated version of the old one?		

The common thread The defining challenge may no longer be building more capability. It may be orchestrating what managers already have so it can adapt and tackle tomorrow's challenges.

1

Assumption 1 of 5

The assumption

"Alternatives are another product opportunity."

What may be true instead

They may reshape wealth distribution itself.

Built for scale
Fit private markets into the distribution model you already have, whether it was built for traditional products or institutional clients.

Built for agility
Reshape coverage, education, platforms and servicing around public/private portfolios as they evolve.

The expansion of private markets into wealth is often framed as a product opportunity. That framing may sound familiar. ETFs were once easy to view primarily as another way to package investment exposure. Their larger impact emerged as they became building blocks for a different approach to portfolio construction.

Managers on both sides of the public/private divide should consider whether they are looking at this shift through a similarly narrow lens.

Traditional managers adding private markets

Build, acquire or partner for private-market capabilities, create wealth-friendly vehicles and bring them through the existing distribution organization.

Alternatives managers expanding into wealth

Extend beyond institutional relationships with new vehicles, platform access, advisor education and servicing at a scale institutional models weren't built for.

Both arrive at the same place: the same advisors, home offices, models and platforms, and the same portfolio allocation.

Either response can appear straightforward. But both may underestimate the change, and the competitive landscape shifts for everyone: a traditional active manager is no longer competing only with another active manager, and an alternatives manager entering wealth now competes with public-market strategies for the same allocation.



Public-market exposures

- Public equity
- Fixed income
- ETFs
- SMAs
- Direct indexing

Private-market exposures

- Private credit
- Private equity
- Infrastructure

Illustrative: an advisor or home-office portfolio team may increasingly choose across all of these for the same slice of a client portfolio.

> *For traditional and alternatives managers alike, the biggest threat may no longer be a similar manager. It may be another use of the allocation.*

Private credit, private equity, infrastructure and other alternative strategies introduce different considerations around liquidity, eligibility, education, portfolio construction, vehicles, platforms, data and servicing. That has implications well beyond manufacturing. Distribution needs to adapt across coverage, knowledge, platforms and intelligence. And increasingly, managers need to understand not simply who owns their products—but **where they fit within a public/private portfolio.**

There is also a client experience challenge. As portfolios become more sophisticated, the experience surrounding them has to become simpler—not more complicated. Advisors and clients will need easier access to education, portfolio context, reporting and servicing across an expanding range of public and private investments.

Product complexity shouldn't become client complexity.

That raises the bar for digital experience, personalization and the ability to deliver the right information at the right point in the relationship.

The constraint on alternatives growth in wealth may therefore prove to be less about creating products and more about **whether distribution can effectively activate them.** Whether a manager is adding private markets or bringing them to wealth for the first time, a model built to scale one kind of product or client may need the agility to serve a very different one.

What distribution needs to do differently

- Identify which advisors and firms are **ready for alternatives**
- Equip sales teams to explain **increasingly sophisticated portfolio roles**
- Make **specialist and generalist coverage** work together
- Give **platforms and vehicle eligibility** more weight
- Build a **broader picture of the portfolio** into client and advisor intelligence

The 2027 challenge

Are you fitting private markets into the distribution model you already have—or preparing distribution for an increasingly public/private portfolio?

2

Assumption 2 of 5

The assumption

"Winning the advisor means winning the assets."

What may be true instead

The center of distribution influence is moving.

Built for scale
Grow coverage: more advisor touches, more meetings, more reach.

Built for agility
Point wholesaler and home-office effort at where allocation decisions are made, and follow influence as it moves.

Asset managers have spent decades building sophisticated organizations around the advisor relationship. That relationship remains critical.

But increasingly, some of the most consequential portfolio decisions can happen somewhere else. Home-office investment teams, centralized research and due-diligence functions, model providers and platforms play increasingly important roles in determining what ultimately reaches client portfolios.

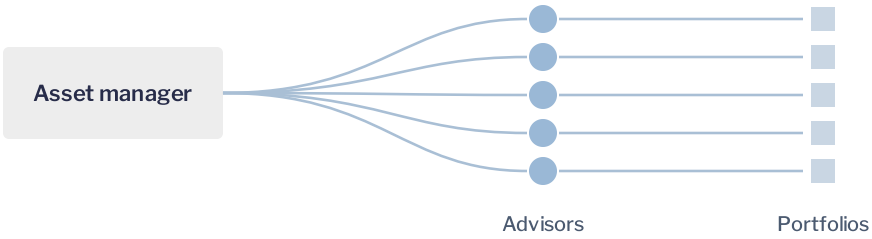
In many ways, today's model-driven environment is itself a product of the last major shift in portfolio construction. ETFs helped make portfolios more modular and scalable; models increasingly institutionalized how those building blocks are assembled. Private markets are now entering that same ecosystem.

Where influence increasingly sits

- Home-office investment teams
- Centralized research and due diligence
- Model providers
- Platforms

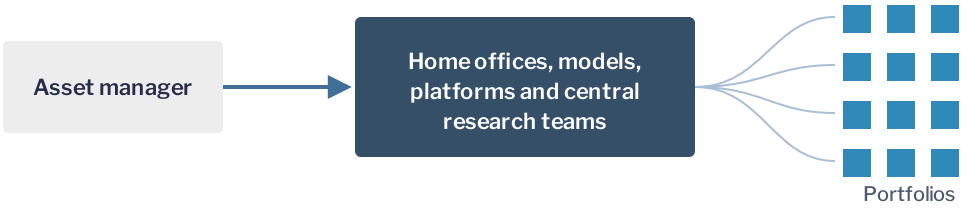
For managers, that changes the unit of opportunity.

Scale of coverage: reaching advisors one at a time



Win the relationship, win the allocation

Scale of influence: shaping portfolios where decisions are made



One decision can move many portfolios at once

The questions distribution intelligence has to answer are expanding

Traditional intermediary intelligence remains important. Model-driven distribution introduces another set of questions on top of it.

Traditional intermediary intelligence asks

- Who are the largest advisors?
- Who owns our products?
- Where are flows occurring?
- Where do we have wallet-share opportunity?

Model-driven distribution also asks

- Which models are growing?
- Who controls them?
- Which strategies are approved?
- Where are we represented?
- What triggers an allocation change?
- Which advisors use which models?
- Where are portfolio gaps emerging?
- How are public and private exposures combined?

> *Distribution is shifting from reaching advisors one at a time toward influencing portfolios at scale.*

Scale doesn't disappear here—it changes form. **Scale of influence replaces scale of coverage**, and keeping up as influence moves requires operating model agility.

That doesn't diminish the wholesaler. **Wholesalers remain one of distribution's most valuable assets.** What changes is knowing where their influence is most useful: which advisors build their own portfolios, which follow models, and where home-office or specialist support matters more. Portfolio context, alternatives education, practice management and market intelligence become more valuable than product knowledge alone.

As portfolio construction becomes more centralized, managers also need to offer value beyond product access: relevant insights, education and digital experiences that make sophisticated solutions easier to position and service.

The manager relationship is increasingly judged not only by what it offers—but by how easy it is to engage with and activate.

This changes how managers think about key accounts, home-office relationships, segmentation, incentives, data and Distribution Intelligence.

A manager can have strong advisor relationships and significant brand recognition but still find itself outside the allocation if it isn't positioned correctly within the models and platforms surrounding those advisors.

The 2027 challenge

Does your distribution organization know as much about the portfolios it's trying to enter as the advisors it's trying to reach?

3

Assumption 3 of 5

The assumption

"AI transformation starts with AI."

What may be true instead

For some managers, the AI problem won't be an AI problem at all.

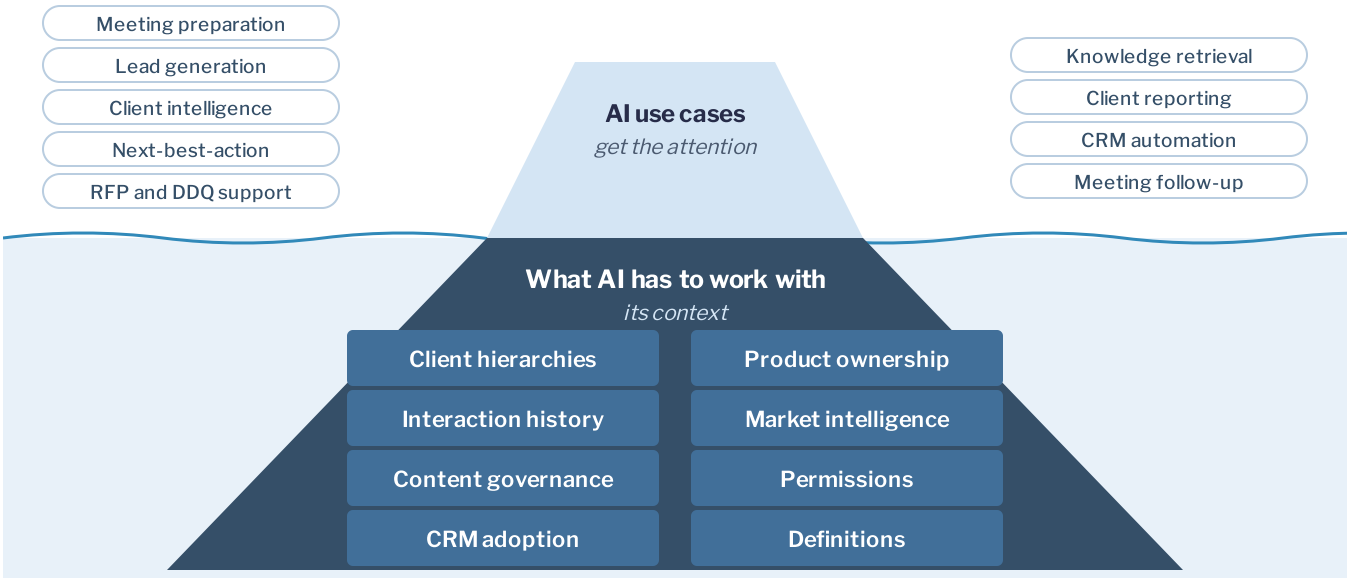
Built for scale
Use AI to do today's tasks faster and at higher volume.

Built for agility
Build an AI-enabling foundation across people, process, technology and data: trusted data, clear ownership and an AI strategy that makes AI a superpower for everyone.

The list of compelling AI opportunities across distribution continues to grow. But every sophisticated AI use case eventually reaches the same question: **what does it have to work with?**

Ask AI to prepare for a client meeting and suddenly everything below the waterline matters, from client hierarchies to permissions.

> *AI didn't create these issues. It made them much harder to ignore.*



Built, bought or self-service, AI depends on the same foundation

AI is arriving through agents from IT and service providers, and self-service tools anyone can direct.

Agents

AI-powered automation that carries out work across systems, often triggered by an event. For example, it can assemble materials as soon as a client meeting is scheduled.

Agent skills

Plain-English instructions that let anyone teach an AI assistant a task, such as turning quarterly commentary into an advisor-ready summary. Easy to read, share and improve, they put AI in the hands of the people closest to the work.

Context

AI is only as good as the context your architecture provides: data, content and conventions. With the right context, AI acts like a seasoned employee, not a new hire.

AI is the clearest stress test yet of years of distribution investment

Managers that have invested in trusted data, mastered client and product structures, connected platforms, governed content and defined workflows may be able to move from experimentation toward activation much faster. Those that haven't may discover that every promising AI use case becomes another data, integration and governance project. AI applied only for scale automates today's work; the foundation underneath is what gives AI agility.

An AI-enabling foundation

People
Clear ownership for each use case, AI-literate teams and a culture of self-service with clear guardrails

Process
Defined workflows, packaged as reusable agent skills

Technology
Connected platforms, with AI built into the tools teams already use

Data
Trusted client and product data and governed content that give AI the right context

> *The firms that get the most from AI may not be the firms spending the most on AI.*

They may be the organizations that spent the last several years creating the foundation required to use it, and that have an AI strategy aimed at making AI a superpower for everyone, not a tool for a few. That changes the AI conversation.

The question isn't simply

What can AI do?

It's

Where can AI create measurable distribution value—and is the organization ready to support it?

It doesn't have to happen all at once

Readiness isn't a precondition to fix everywhere before starting. The most effective path is often incremental: each use case delivers value now and leaves the foundation stronger for the next one.

1. **Pick one high-value use case**
2. **Strengthen the data and workflow it needs**
3. **Deliver, measure and learn**
4. **Package what works as reusable agent skills for the next one**

The 2027 challenge

If you activated your highest-value AI use case tomorrow, would your distribution architecture actually be ready?

4

Assumption 4 of 5

The assumption

"More intelligence creates better decisions."

What may be true instead

Distribution may have reached peak dashboard.

Built for scale
More dashboards, reports, scorecards and data coverage.

Built for agility
Activate signals inside the workflows where people act, with a clear owner and next step.

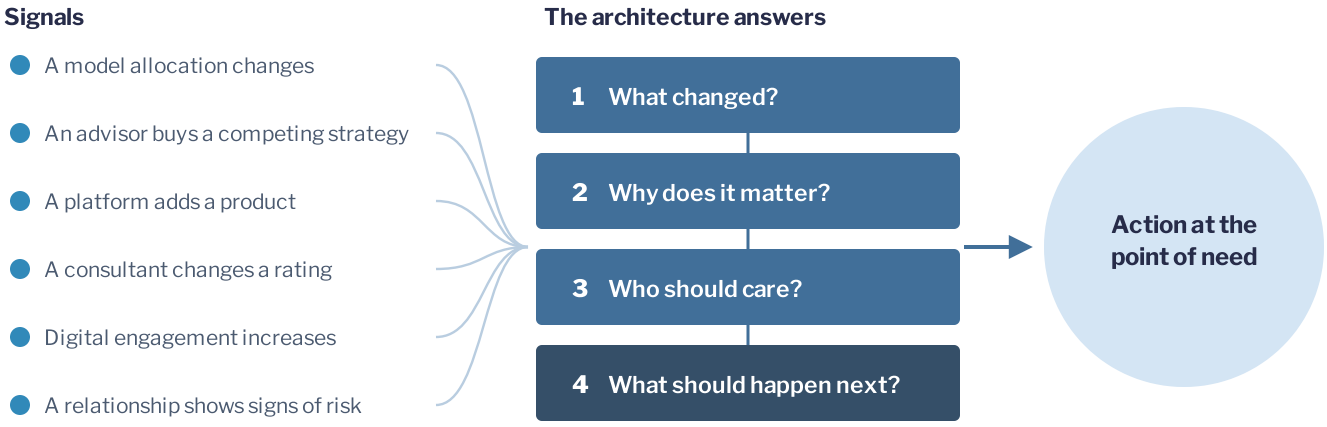
The industry has no shortage of information. Managers have spent years creating dashboards, reports, scorecards, alerts and increasingly sophisticated analytics.

But more visibility doesn't automatically create better decisions. In some organizations, another dashboard may introduce another place sellers have to look, another set of metrics leadership has to reconcile and another step between insight and action.

Many managers have already invested heavily in identifying the right signals. **The harder part has been activating them**: getting each signal to the right person, inside the workflow they already use, at the moment it matters.

The next generation of Distribution Intelligence needs a different objective. Events like these shouldn't simply appear somewhere for someone to discover.

> *Another dashboard is still another place someone has to look.*



From signal to action: what an intelligent distribution architecture should help answer

The measure of success is changing

From
Information delivered

To
Decisions influenced

That represents a fundamental move from visibility toward activation—from intelligence built for scale to intelligence built for agility. Four kinds of intelligence work together to get there:

Market Intelligence
Identifies where opportunity is developing.

Client Intelligence
Provides context around the relationship.

Knowledge Intelligence
Brings the organization's expertise to the point of need.

Leadership Intelligence
Helps determine where resources should be deployed.

> *The next generation of Distribution Intelligence shouldn't give people more to analyze. It should reduce how much they have to figure out.*

The future isn't necessarily another place for sellers to look. **It's knowing when they need to look at all.**

What activating signals in the workflow looks like

- Signals arrive inside the tools teams already use, such as CRM and meeting preparation.
- Each signal has an owner and a suggested next step.
- Routine signals prompt action directly; exceptions go to people for judgment.
- Success is measured by what happened next, not by what was seen.

The 2027 challenge

If your teams still have to find the insight, interpret it and determine what to do next, how intelligent is your distribution architecture?

5

Assumption 5 of 5

The assumption

"Modernizing technology modernizes distribution."

What may be true instead

Your operating model may now be the constraint.

Built for scale
A modern, standardized technology stack.

Built for agility
An operating model that can reconfigure coverage, workflows and decision rights across that stack.

Most managers today have access to remarkably sophisticated technology. The technology stacks across managers are becoming increasingly similar. **The outcomes are not.**

Leaders

Have built a distribution architecture where data moves reliably, intelligence reaches the point of action, technology supports defined workflows and teams spend more time engaging clients.

The result: goals met, and the agility to adjust as the market moves.

Laggards

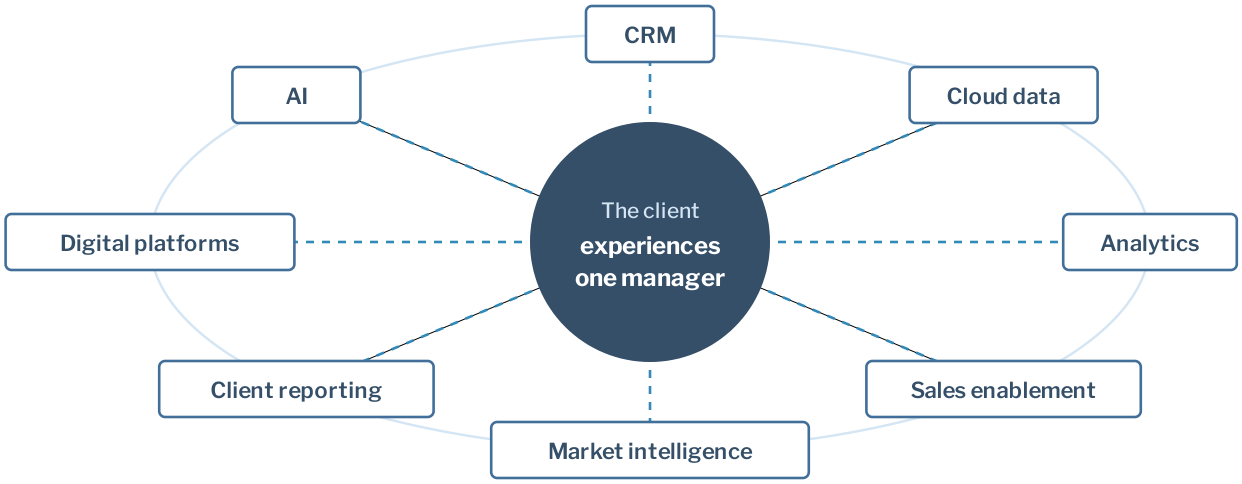
Continue to add new capabilities onto fragmented processes and disconnected operating models.

The result: more tools, the same friction, and a growing operating-model debt.

The difference increasingly sits **between the platforms**—in how they are connected, who acts on what they produce and how work moves across them.

Managers invest in platforms independently.

Clients don't experience them independently.



Operating-model debt

When the way you work can't keep up with what you've built

What we mean by operating model

How distribution actually runs day to day: who covers which clients, how work moves from one step to the next, who owns data and decisions, and how teams are measured and paid.

What we mean by operating-model debt

Like technical debt, it builds up when the way you work stays fixed while technology and the market move on. Every workaround, manual handoff and ignored signal adds to it. The interest is paid in slower response, missed opportunities and capability that never gets used.

Laggards rarely lack technology. What they lack is an operating model that connects it. Their coverage, processes and decision rights were designed for an earlier market, and each new platform gets bolted onto that design rather than woven into it.

The result is a rigid, dated operating model that struggles to meet today's challenges, let alone tomorrow's. And unlike technology debt, it rarely shows up on a project list, because it sits between the platforms rather than inside any one of them.

Where operating-model debt hides

- How is data mastered, and who owns it?
- How does intelligence reach distribution, and who acts on it?
- How do specialist and generalist coverage interact?
- How does a meeting move from preparation to engagement to follow-up?
- How are client experiences connected?

The same signal, two operating models (illustrative example)

The signal: an advisor opens a private credit fact sheet in the client portal three times in a week and downloads the latest model commentary. Sales enablement shows the wholesaler shared that strategy's deck last month.

Laggard: the signal stays where it landed

Activity sits in the portal's own analytics, reviewed monthly if at all	→	Nothing reaches the CRM or the wholesaler's call plan	→	The next call is about a different product

Outcome: interest goes cold, and another manager fills the allocation.

Leader: the signal reaches the point of action

Portal and enablement activity flow into the CRM with context	→	The wholesaler and product specialist get a prompt and a suggested next step	→	Follow-up within days, with the content the advisor was reading

Outcome: the conversation matches the advisor's interest, and the allocation is in play.

Clients don't experience your investments separately. They experience one manager.

Managers have invested independently in portals, client reporting, CRM, sales enablement, websites, digital content and servicing workflows. In a connected experience:

> *The next phase of Client Experience isn't simply more digital. It's more connected, contextual and personalized.*

A meeting understands what happened digitally before it.

A salesperson understands the reporting and service experience surrounding the client.

Digital engagement informs the next interaction.

Reporting reflects what matters to the relationship.

And increasingly, clients should be able to move between human and digital engagement without starting over. That requires more than technology. It requires the organization to connect data, workflows, responsibilities and experiences across channels. The risk is that technology has evolved faster than the organization surrounding it.

> *Managers may discover that their biggest constraint in 2027 isn't technology debt. It's operating-model debt.*

Technology can be modernized for scale. Agility comes from how these evolve alongside it:

Coverage models | Responsibilities | Workflows | Governance | Incentives | Decision rights | Data ownership | Client journeys

The next transformation may therefore be less about implementing another platform and more about redesigning how distribution operates across the platforms managers already own.

The 2027 challenge

Have years of technology investment created a more adaptable distribution organization—or simply a more sophisticated version of the old one?

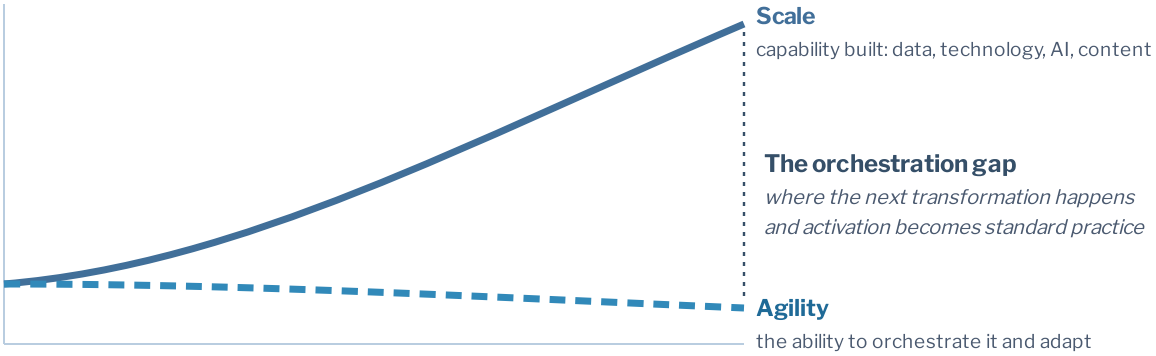
Conclusion

The distribution paradox of 2027

Managers have never had more capability—more data, technology, intelligence, products, content, digital channels and AI. **Clients have never had higher expectations** of how easily those capabilities should come together.

Yet distribution isn't becoming simpler. Private markets are expanding the investable universe. Models and home offices are changing where influence sits. AI is changing how work gets done. And clients and advisors expect increasingly sophisticated, personalized and connected engagement.

> *The industry has spent years adding capability while the challenge has increasingly become orchestrating it.*



For many managers, **distribution has built scale faster than agility**, though some are still finishing the scale work itself. That gap is where we believe the next phase of distribution transformation will occur.

- ✕ Not another CRM project
- ✕ Not another data project
- ✕ Not another analytics project
- ✕ Not another AI pilot
- ✕ Not another disconnected digital experience

→

A connected distribution operating model

- Foundation
- Intelligence
- Workflows
- Technology
- Client experience

aligned around how the business increasingly needs to operate

What to do next

Where to invest in 2027

The next phase of distribution transformation doesn't start with another platform. It starts with knowing where you stand, then acting in two areas.

Where do you stand, and where should you focus?

Agility ↑	Scale →
Nimble but hard to repeat Strengthen the foundation so what works can be repeated.	**Scale that can adapt** Keep upgrading the operating model as the market shifts.
Fragmented Start with the foundation, with flexibility built in.	**Efficient but rigid** Upgrade the operating model and pay down its debt.

0 Establish the baseline

Informs both areas

Map where your operating model and architecture stand today, where time goes, and how quickly you can adapt. The findings set the priorities for steps 1 and 2.

1 Get the foundation right

Builds scale

Connect your distribution architecture

Integrate CRM, data, enablement, portals and analytics so information flows to where work happens.

→ **One view of the client, and signals that reach people.**

Master client, account and product data

One trusted source with consistent hierarchies and definitions.

→ **Reporting you can trust, and AI with the right context.**

Finish the scale work

Standardize and automate repeatable work such as reporting, onboarding and routine servicing.

→ **Capacity freed for clients and for change.**

2 Upgrade the operating model

Builds agility

Redesign workflows to activate intelligence

Build signals into daily work, with clear owners and next steps.

→ **More signals become conversations.**

Rethink work around AI

Redesign key workflows with agents and agent skills rather than bolting AI on. Start with one and expand.

→ **Time back for sellers, and faster response.**

Connect the client journey and realign roles

Fix handoffs across marketing, sales and service, with decision rights and incentives that reward connected outcomes.

→ **An experience that feels like one manager.**

How you'll know it's working

- Less time from signal to action
- Less time to launch on a new platform
- More seller time spent with clients

Scale and agility aren't a trade-off. Build the scale that's still missing, and the agility to keep adapting as the market moves.

2026 Scale

We argued that inefficiency was inhibiting the buildout of necessary scale.

2027 Agility

Adaptability becomes non-negotiable.

Five assumptions, revisited

Products, portfolio construction, centers of influence, technology and client expectations are all changing at once.

1	*"Alternatives are another product opportunity."*	→	**They may reshape wealth distribution itself.**
2	*"Winning the advisor means winning the assets."*	→	**The center of distribution influence is moving.**
3	*"AI transformation starts with AI."*	→	**For some managers, the AI problem won't be an AI problem at all.**
4	*"More intelligence creates better decisions."*	→	**Distribution may have reached peak dashboard.**
5	*"Modernizing technology modernizes distribution."*	→	**Your operating model may now be the constraint.**

> The managers that separate themselves won't necessarily be those that invest the most. **They will be those that can connect what they've built, adapt how distribution works, elevate the client experience and turn intelligence into action.**
>
> Scale got distribution here. Agility will define the leaders.

One final question for distribution leaders

If you were designing your distribution organization today—for private markets, model-driven portfolios, AI-enabled workflows, increasingly centralized decision-making and higher client expectations—would you build the one you have now?

How Olmstead can help

Turning these questions into a plan

Olmstead's Client Experience Practice helps investment managers build scale that can adapt—connecting what they've built across sales, marketing and client experience, and reshaping how distribution works for what comes next.

Distribution Architecture

Applies modern data principles to optimize the customer journey and the distribution stack.

Relevant to Assumptions 3, 5

Distribution Intelligence

Benchmarks the distribution operating model across data, applications and delivery.

Relevant to Assumptions 2, 4

Client, Account & Product Master

A unified source for client, account and product data that enables executive-level reporting.

Relevant to Assumptions 1, 3

Client Segmentation

Scalable, consistent client identification and service models across channels.

Relevant to Assumptions 1, 2

CRM Health Assessment

Evaluates CRM usage, workflows, integrations and data management.

Relevant to Assumptions 3, 5

Sales Enablement & Client Communications

Improves the speed and quality of client and prospect reports while reducing risk.

Relevant to Assumptions 4, 5

About Olmstead

Olmstead is a consulting firm dedicated to the investment management industry. Our consultants bring years of industry experience to help asset managers, asset owners, insurers, wealth managers and asset servicers operate better.

We transform investment managers through data-centric solutions—enabling agility, growth and innovation across operations, data and distribution.

Start the conversation



Austin Lewis

Head of Client Experience Practice

lewis@olmst.com

olmst.com

Olmstead

This perspective is provided for informational purposes and reflects the views of Olmstead as of its publication date.