



View this article below on our website.

[JP Morgan Asset Mgmt Creates Content Group to Target Inst'l Investors](#)

JP Morgan Asset Mgmt Creates Content Group to Target Inst'l Investors

Article published on October 6, 2021

J.P. Morgan Asset Management has launched a dedicated group led by CEO **George Gatch** to create content for current and prospective institutional clients.

The new strategic investment advisory group will include chief investment officers, portfolio managers and strategists who will analyze and comment on issues impacting markets and investments. Gatch will be the executive sponsor of the initiative and **Michael Cembalest**, chairman of market and investment strategy, has been appointed chair.

The dedicated group brings together more than 16 team leaders across the asset management arm, and includes names such as CEO for Asset Management in the Americas **John Donohue**, Head of Institutional Portfolio Strategy **Jared Gross**, Global Head of Asset Management Solutions **Jed Laskowitz**, Head of Global Multi-Asset Strategy and Multi-Asset Solutions **John Bilton** and Global Head of Alternatives **Anton Pil**.

There will be no change to titles or any reorganization as a result of the new group, according to Gatch.

While the asset manager has previously provided research and insights to its institutional investors, the creation of this new group signals that the firm is “doubling down on our commitment to examining the issues that matter most to clients,” Gatch said in a company statement. The advisory group brings together leaders in J.P. Morgan Asset Management across asset classes and offers a perspective from a “globally integrated team,” he added.

The group, which published its first paper on real interest rates this week, plans to put out content on a “regular basis,” with the next paper scheduled for the first quarter of 2021, Gatch told FundFire. “We also expect that our insights will have broader appeal and prove to be a valuable tool to engage with prospective institutional clients,” he said.

Sales and marketing teams will continue to play a key role in distributing the content and engaging with clients, Gatch said. The firm aims to gather qualitative feedback from readers and evaluate engagement with the published content to determine future topics.

Asset managers have been increasingly offering their clients and prospective investors more than just investment products, [as reported](#). In-house research, asset allocation models and general guidance from

the asset manager's own staff are all examples of complementary services. Offering something beyond just investment products can be seen as a way for firms to differentiate themselves and fend off competitors at a relatively low marginal cost.

Capital Group also recently launched a dedicated effort to create and share content with clients this year, [as reported](#). Though Capital Group's content group will target wealth channel gatekeepers rather than institutional investors, they too said their aim was to create regular research analyzing the market and explaining how investments may be affected. Capital Group's content efforts are being led by Vice President of Marketing and Communications **Apu Sikri**, who has taken a "chief content editor"- like role.

Asset managers have long shared content — whether it be thought leadership or research — with investors, but these days, it's less commercially-driven and more educational, said **Dan Sondhelm**, CEO of **Sondhelm Partners**. The creation of dedicated groups may indicate that asset managers are reallocating resources and realizing the importance of content as a way of engaging existing and prospective clients, he said.

"I think asset managers are treating content and thinking about it more like a newsroom," Sondhelm said. "Many of the big shops are building kind of newsrooms internally to stay on top of what clients are thinking about. They don't want it to look like marketing."

Asset managers can also use content to gather information and data on investors. Platforms like **Seismic** allow sales professionals to see whether a client opened an email, how many pages or slides of the content they viewed, how much time they spent on certain pages, which links were clicked on and more, according to **Bill Finnegan**, the firm's managing director of financial services marketing. Meanwhile, asset managers' marketing teams can see what type of content drew the most engagement and helped drive conversations and which did not have much impact.

Tracking metrics related to how existing and current clients are engaging with the firm's content can help inform a sales professional's strategy, Sondhelm said. An institutional investor that downloads a whitepaper from the asset manager and continues to engage with other types of content from the firm can be flagged as a new lead. A person on the sales team can then figure out who this person is and start a relationship, he said.

Meanwhile, if a person that has been actively engaged over the last few years suddenly stops opening emails from the firm and stops reading content on the firm website, it can indicate that the client is at risk of leaving, Sondhelm said. A sales professional can then give the client a call and intervene.

"Engagement data is a great predictor," Sondhelm said. "You know who your next clients are going to be and who's going to fire you next."

Publishing content and using reader engagement data takes some of the burden off of sales professionals, Sondhelm said. Without engagement data to inform sales strategy, a sales person would be responsible for engaging with every client four times a year and trying to determine what the client or prospective client is thinking about.

“If you integrate a content strategy that includes data, you can allow much of the communication to happen through the content and technology,” Sondhelm said. “This way, as a salesperson, you can focus on the warmest opportunities, the warmest digital leads.”