Driving Organic Growth for Asset Managers

PERFORMANCE DEVELOPMENT FOR CLIENT-FACING TEAMS

Built for asset managers' client-facing personnel, the Performance Development System (PDS) makes performance visible, measurable, and coachable without disrupting compliance, workflows, or existing systems.

- Improves sales effectiveness
- Strengthens product fluency
- Deepens prospect and client engagement

OUTCOME: Clearer insight. Better conversations. Faster conversion.

CORE DEVELOPMENT FRAMEWORK

Activation

PRODUCT INTELLIGENCE

Builds consistent product fluency and clear messaging across teams

Evaluates product readiness and builds fluency through structured assessment, practice, and progressive mastery.

CORE CAPABILITIES

- Baseline assessments
- Progressive mastery levels
- Narrative alignment
- Readiness visibility
- Risk signals
- Structured practice

WHY IT MATTERS

Reduces misalignment and improves confident, compliant representation.

Optimization

SALES INTELLIGENCE

Surfaces execution quality in advisor conversations

Analyzes how reps execute in advisor conversations, without disrupting workflows or compliance.

CORE CAPABILITIES

- Conversation structure and framing
- Engagement quality and objection handling
- Outcome progression and next-step momentum
- Coaching triggers and execution risk signals

WHY IT MATTERS

Gives leaders clear visibility into what's working and where execution needs to improve.

Acceleration

COACHING INSIGHTS

Reinforces execution through targeted, practitioner-led coaching

Delivers practitioner-led coaching that turns insight into behavior change.

CORE CAPABILITIES

- Leadership communication
- Advisor engagement skills
- Execution alignment
- Targeted coaching
- Continuous improvement

WHY IT MATTERS

Ensures capabilities are adopted, reinforced, and sustained.

KEY DELIVERABLE

A Continuous Development Loop

PDS creates a continuous development loop: assess readiness, build capability through practice, evaluate execution, target coaching, and measure progress.

The Challenge Asset Managers Face

THREE CRITICAL GAPS

01

Competency

Do our people know the products, narratives, and markets well enough to represent them effectively?

02

Skills

Can they translate that knowledge into strong advisor conversations and consistent execution?

03

Measurement

Can leaders see who is ready, where execution is breaking down, and whether development is working?

RESULT: **Fragmented training and disconnected tools make these gaps difficult to solve at scale.**

ENTERPRISE OUTCOMES

Measure what matters: product readiness, conversation effectiveness, coaching progress, and business outcomes.

- **Product Readiness & Narrative Consistency**
- **Sales Capability & Execution**
- **Advisor Engagement & Conversion**
- **Organizational Consistency & Scalability**

Why This System Works

AlphaScale gives leaders a system to align teams, elevate individuals, and deliver results.

Our practitioner-led expertise is grounded in asset management, built around real distribution dynamics, and focused on measurable, business-moving outcomes, not templates or theory.

Engagement Approach

Programs can begin with a focused team, product, or business priority and expand based on scope, results, and organizational needs.

NEXT STEPS

Contact Mark Spina at **Mark@TheAlphaScale.com** to explore how the Performance Development System can strengthen product readiness, improve sales execution, and drive more consistent results across your distribution organization.