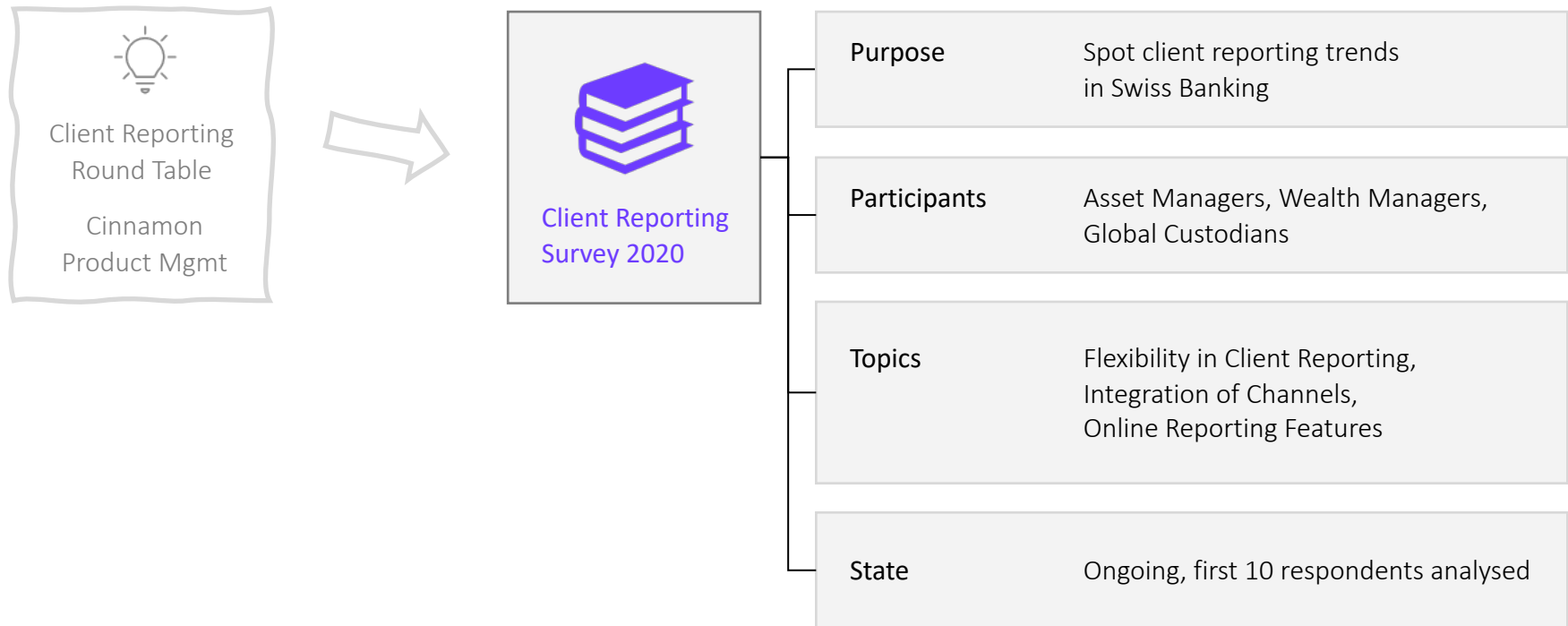# Preview of the Client Reporting Survey 2020

Thomas Tscherrig

Marcus Brändle

bmpi

Background information on the survey

Client Reporting
Round Table

Cinnamon
Product Mgmt

Client Reporting
Survey 2020

|	
Purpose	Spot client reporting trends in Swiss Banking
Participants	Asset Managers, Wealth Managers, Global Custodians
Topics	Flexibility in Client Reporting, Integration of Channels, Online Reporting Features
State	Ongoing, first 10 respondents analysed

Flexibility in Client Reporting
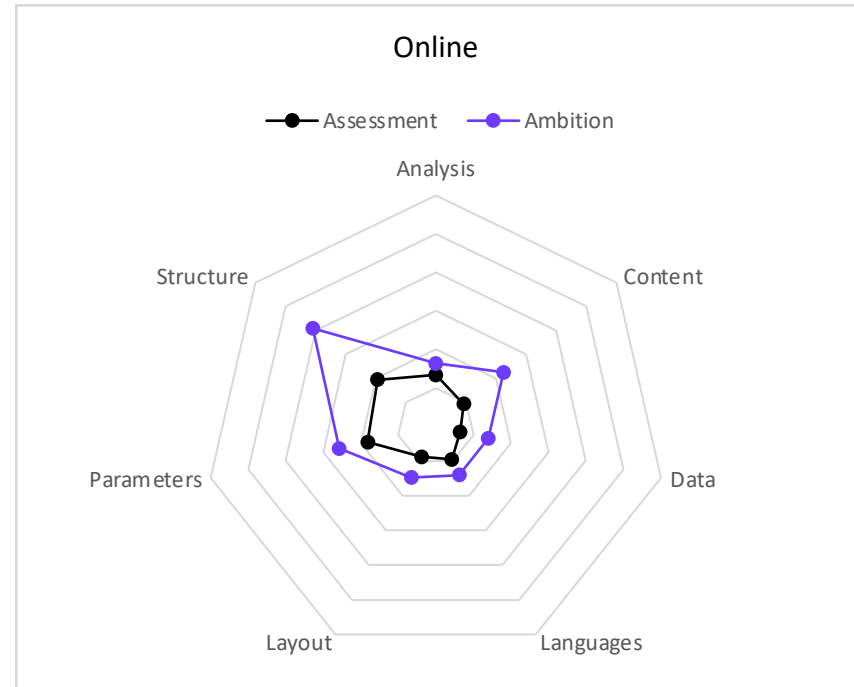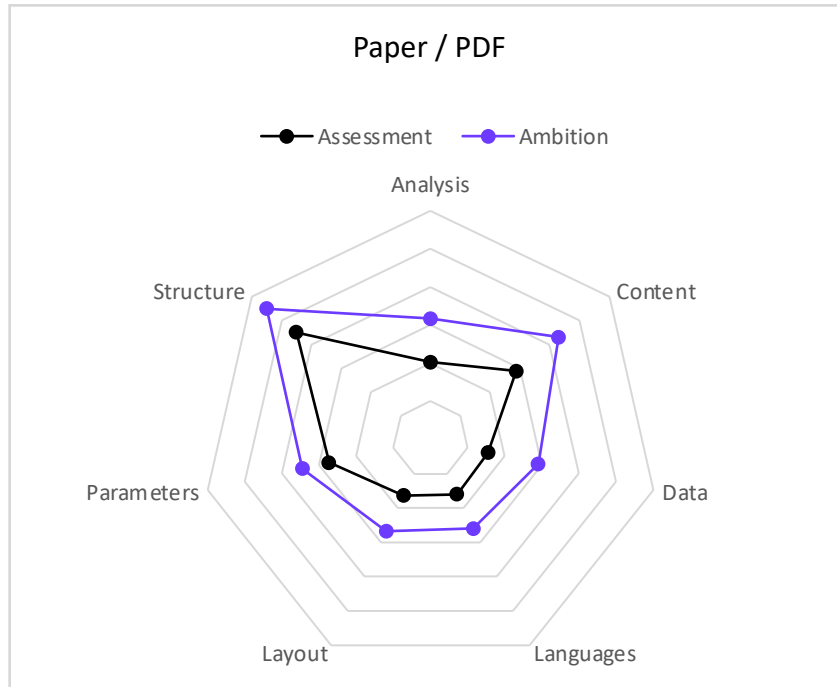
‣ Flexibility of report structure has the highest assessment and ambition.
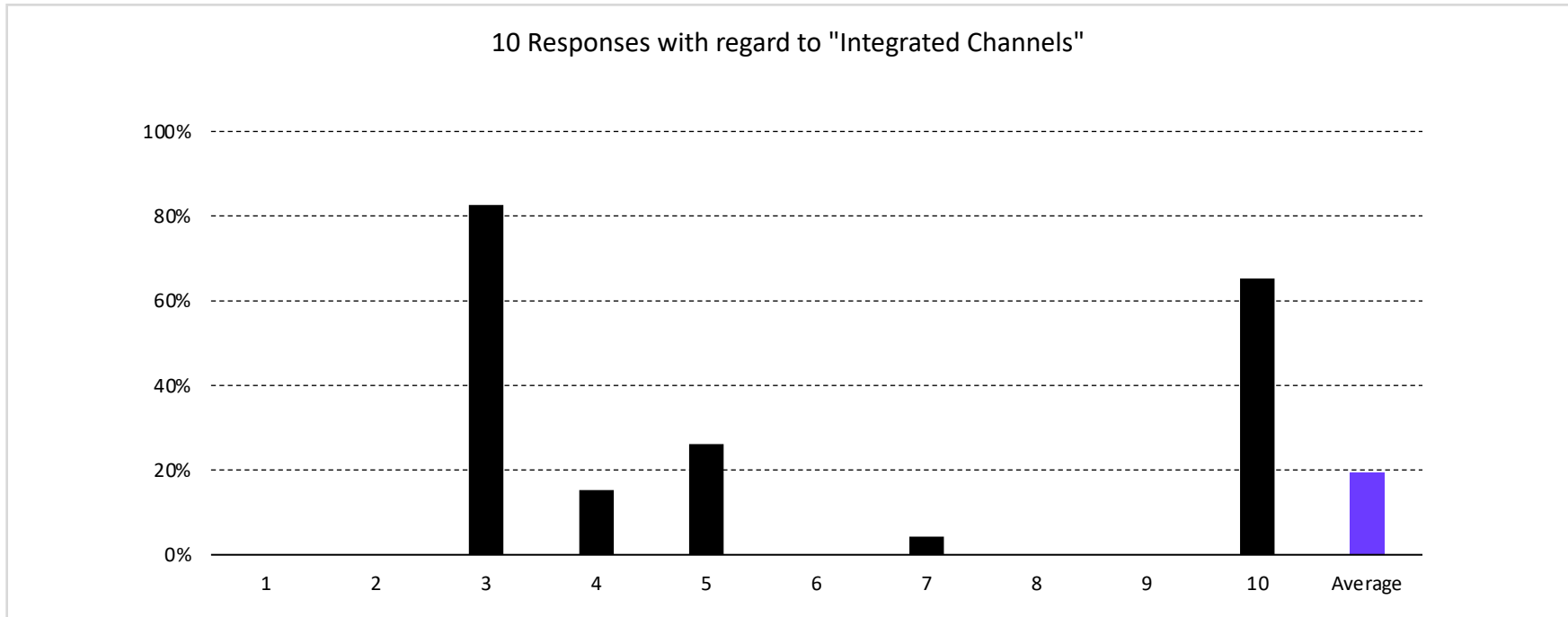‣ Online reporting should catch up with paper reporting

Example using Cinnamon

Mockup Onlinereport anschauen

https://cinnamon.bmpi.ch/sample-report
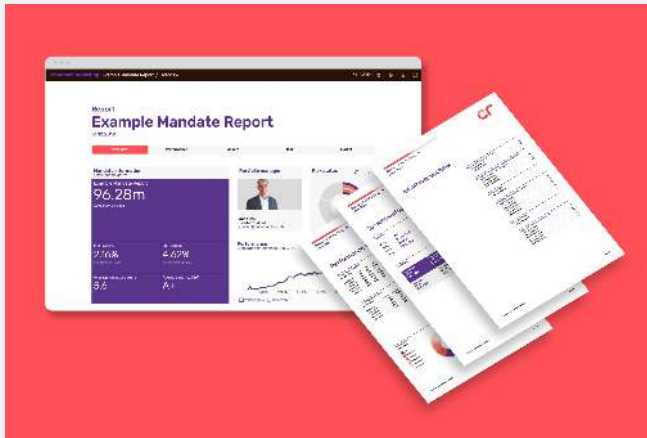
- ‣ Live demo at Trends in Client Reporting 2020
- ‣ Structural flexibility features cannot be accessed through the public website. Please contact us.
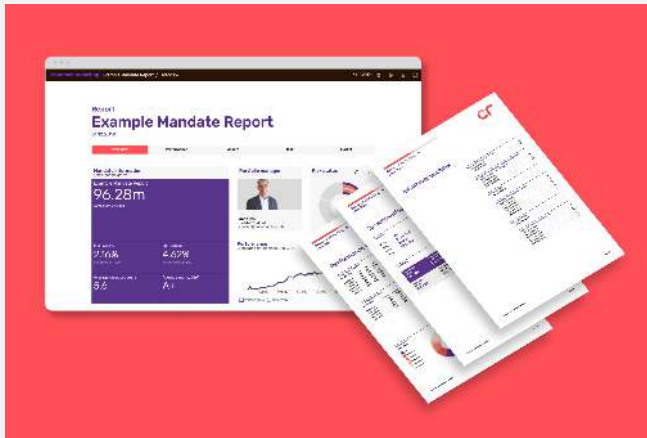
2 Channel Integration

10 Responses with regard to "Integrated Channels"

▸ Currently there is a very low integration of the paper and online channel. Only 2 respondents have stated a rather high integration.
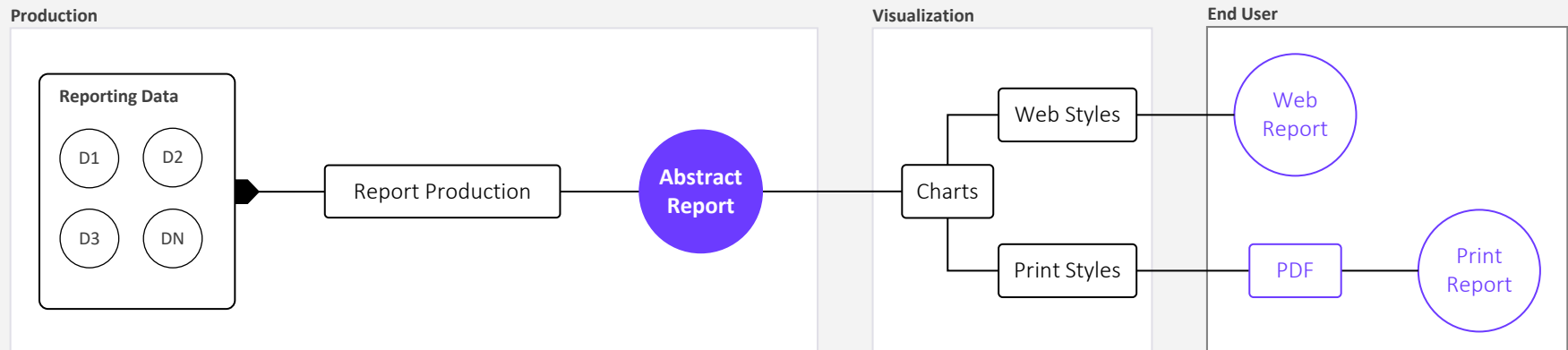
Source: Preliminary results of the bmpi Client Reporting Survey 2020

Example using Cinnamon

Mockup Onlinereport anschauen
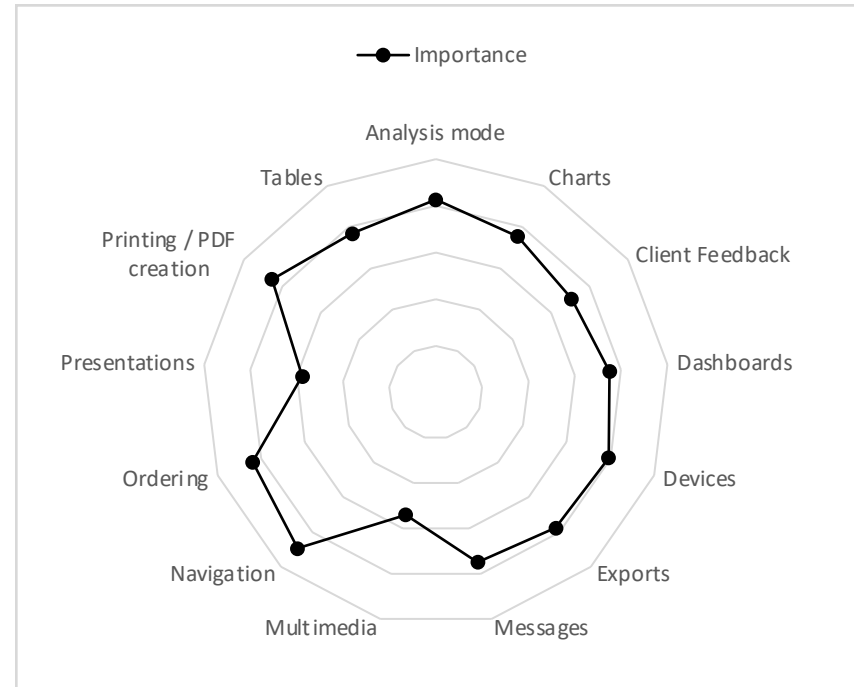
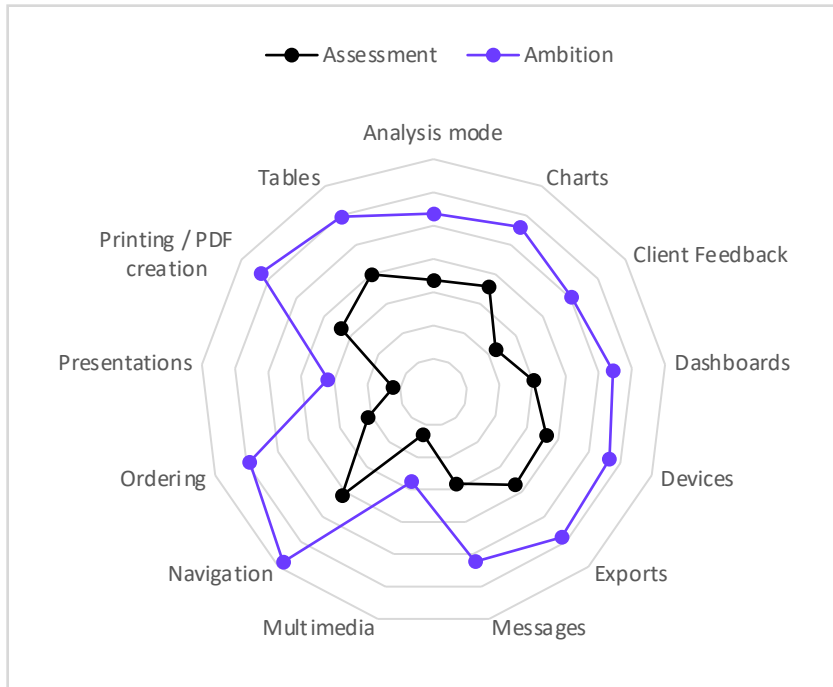https://cinnamon.bmpi.ch/sample-report

- ‣ Live demo at Trends in Client Reporting 2020
- ‣ Channel integration features cannot be accessed through the public website. Please contact us.

Channel Architecture of Cinnamon

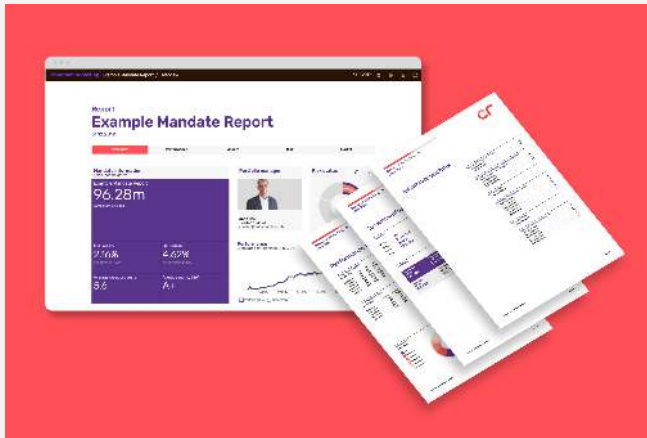▸ Cinnamon uses the concept of an abstract report which serves all channels

Online Reporting Features

‣ Very high ambition to improve online reporting
‣ Main topics are navigation, printing and (PDF report) ordering

Source: Preliminary results of the bmpi Client Reporting Survey 2020

Example using Cinnamon

Mockup Onlinereport anschauen

https://cinnamon.bmpi.ch/sample-report

▸ Live demo at Trends in Client Reporting 2020

Page Speed Optimization of Cinnamon
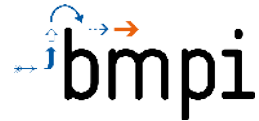

‣   User experiences almost no lag

Wrap up

Main findings:

▸ Product managers will increasingly seek flexibility to meet client needs.

▸ Integration of online and paper would produce synergies.

▸ Ambitions in online channels are very high.

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Contact us for further information or an individual assessment of your organisation.

The survey will be completed by the end of year. Respondents will receive detailed results.