AI–Based Campaign Management

Asset Management Case Study

Transforming client engagement through artificial intelligence and data-driven precision in asset management.

The Asset Management Landscape

The asset management industry is experiencing unprecedented scale and complexity, driven by immense growth but also facing significant market pressures.

$147T
AUM in 2025
Projected global Assets Under Management

$200T
AUM by 2030
Further projected growth for global AUM

3x
Alternative Assets Growth
From $7.2T to over $20T in a decade

Despite this growth, the industry faces challenges like tight margins, rising operational costs, and eroding revenue yields, necessitating strategic responses to maintain competitiveness.

Facing these pressures, a leading asset management company sought to enhance client engagement and optimize resource allocation with an AI-enabled campaign management program.

Source: McKinsey, PwC

The Challenge

Limited Personalization

Unable to personalize at scale across increasingly diverse client bases.

Uncertain Timing

Campaign timing and channel allocation reducing engagement effectiveness.

ROI Tracking Difficulty

Challenges tracking ROI and dynamically optimizing ongoing campaigns.

With growth ambitions high, the firm aimed to modernize its marketing stack and unlock data-driven insight.

The Solution

BeyondRisX Consulting developed and implemented a cutting-edge, AI-driven program to transform campaign management and improve client engagement.

Exploring the Solution: A Preview

Segmented Client Behaviour

Understanding distinct client segments through data analytics, which will be elaborated in the next card.

Personalized Content and Offers

AI-powered content tailored to individual preferences, detailed in an upcoming card.

Predicted Optimal Engagement

Determining best channels and timing for interactions, to be explored in the following card.

Real-Time Optimization

Continuous campaign refinement based on performance data, which the final card will cover.

Segmented Client Behaviour

BeyondRisX Consulting leveraged advanced data analytics to identify distinct client segments and behaviour patterns, enabling highly targeted engagement strategies tailored to specific audience needs.

Segmentation Methodology

Combined demographic, psychographic, and behavioral data points. Employed unsupervised machine learning algorithms (K-means clustering) to group clients with similar characteristics into meaningful segments. Ensured segmentation was empirically derived rather than assumption-based.

Key Behavioral Patterns

Analyzed client data from CRM systems, web analytics, and transactional databases, revealing:

- Engagement Levels: Interaction frequency, content consumption, responsiveness
- Investment Preferences: Product types, risk tolerance, portfolio allocation
- Risk Profiles: Transaction history, declared preferences, market exposure
- Purchase Frequency & Value: Recency, frequency, and monetary value

Segment Prioritization

Prioritized segments based on potential value, growth prospects, and strategic importance. Generated actionable insights to understand each segment's unique needs. Some segments required high-touch personalized advisory, while others responded better to digital self-service options.

Impact on Targeting

Granular segmentation enabled significant campaign effectiveness improvements:

- Tailored product offerings to specific needs
- Optimized communication channels and timing for maximum impact
- Developed personalized messaging that resonated deeply with each segment

Personalized Content and Offers

Automated Generation
AI-powered content creation at scale.

Individual Preferences
Tailored to unique client needs.

Lifecycle Moments
Delivered at optimal times.

Predicted Optimal Engagement

AI-Powered Precision

Used artificial intelligence to determine the best channels and timing for each client interaction, maximizing engagement rates and response quality.

- Channel optimization across email, social, and direct outreach
- Predictive timing for maximum impact
- Continuous learning from interaction data

Real-Time Optimization

Performance Dashboards

Live tracking of campaign metrics and KPIs for immediate visibility.

Dynamic Refinement

Continuous campaign optimization based on real-time performance data.

The Impact

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Increase in Client Engagement

Markedly increased client engagement and satisfaction levels.

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Reduction in Acquisition Costs

Enhanced campaign ROI with lower acquisition costs.

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3x faster campaign deployment

Empowered marketing teams to operate at scale with precision.

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Improvement in Conversion Rate

Achieved higher conversion rates through timely, relevant interactions.

From Reactive to Predictive

By embedding AI-driven insights into campaign management, the asset management company elevated client engagement from reactive tactics to predictive strategy, delivering measurable ROI improvements while creating personalized experiences at institutional scale.