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# Lazard Asset Management.

User experience review & peer comparison

Presented by  
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# Lazard Asset Management Peer Comparison

Company	Attestation	Insights	Mega Menus / Navigation	Search	Personalization	Events	Blogs	Preference Centre	Social Media
Lazard AM	2	2	2	2	1	None	None	2	2
Capital Group	1	2	1	1	1	None	None	1	2
Schroders	1	1	1	1	2	2	None	2	2
Janus Henderson	2	2	1	2	1	2	None	1	2

Company	Fund Explorer	Product Pages	Featured Funds	Mini Fund Finder	Document Library	Fund Cards	Wishlist	Advanced tools	Login Experience
Lazard AM	2	2	2	None	Within FC	None	2	None	2
Capital Group	1	1	None	2	2	None	2	None	1
Schroders	2	2	2	None	2	None	None	2	None
Janus Henderson	2	3	1	None	2	None	None	2	2

Rating Scale - 1 Good / Average 2 / Poor 3

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# Peer Comparison Highlight

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- **Lazard Asset Management** - Good function to explore the core proposition, insights & product information.
  - Opportunity to make improvements across the customer experience to reduce journey times and enhance features
  - Improvements to the fund buying experience could reduce clicks and increase integration of call to actions
  - Mobile experience is sub optimal.
- **Schroders** - Market leading, persona-lead content strategy, room for improvement within the fund buying experience
  - Good attestation experience with with specific content strategy by Investor type
  - Reducing length of user journeys with mega menus and segregated site search
- **Capital Group** - Advanced experience within the fund buying and thought leadership areas.
  - Good overall experience
  - Preference centre and login experience
- **Janus Henderson** - Good engagement loop with stage two personalisation of attestation and subscription centre
  - Subscribe to content themes and fund document distribution
  - Well orchestrated featured fund pages with integrated content and data strategy and call to actions

# Recommendations

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## UX & CX framework evaluation

- Attestation - could reduce the journey and better reflect different persona type experiences
- Global landing pages by default have no GEO look up so doesn't provide suggested country before investor type persona
- The user journeys as persona types are linear so you don't get to see insight content and data in parallel
- Improve mobile browsing experience and review speed / performance of site structure and infrastructure.
- None / very little in terms of call to actions for users - passive experience
- No gating of content or features to turn unknown browsers into known prospects using marketing automation and preference centre features

# Recommendations

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## Fund Buying Experience

- Fund finder / explorer could be improved with the introduction of fund cards within the explorer and compress tabs within explorer.
- Product page experiences lack integrated content or advanced 'featured fund / strategy' capability
- **Actions** - CX/UX review programme to re-evaluate the user journeys within the fund merchandising. Review specific use cases across the site to make recommendations for improvements that lead to product data and content related experiences.

# Contact

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