AI in asset managment

The digital edge: Transforming asset management sales with AI

Transforming wholesaler sales teams with AI-powered solutions

Wholesalers spend up to 50 percent of their time on manual research and administrative tasks, navigating a dozen systems to prepare for a single meeting[1]. The integration of artificial intelligence (AI) in sales is revolutionizing this workflow, unifying data from different sources, slashing prep time, and thereby empowering sales teams to be dramatically more productive, enabling hyperpersonalization at scale.

Key challenges in the traditional sales process[1]

Productivity loss from manual prep

Sales spends 30–45 minutes preparing for a single client meeting, losing valuable time that could be spent on client-facing activities.

Fragmented data and insights

Critical intelligence is scattered across customer relationship management (CRM), market data platforms, internal systems, and past meeting notes, resulting in inconsistent client insights.

High cost of sales

The significant time spent on administrative work like documentation inflates the cost of sales and creates a barrier to scaling coverage for sales team without adding significant headcounts.

The most time-intensive sales activities include:

- Identifying and qualifying new prospects
- Conducting pre-call research across 10 or more systems
- Creating an agenda and talking points
- Capturing meeting notes and updating the CRM

[1] "KPMG LLP, proprietary data, 07/30/2026"

The agentic framework: AI-driven sales transformation[1]

Implementing an AI-powered agentic framework for the wholesale distribution sales team can dramatically improve key metrics, transforming the entire sales lifecycle from prospecting to follow-up. This gives sales teams more opportunities to close deals and build relationships.

Metric	Before AI	After AI	Improvement
Average prep time	30–45 minutes	<15 minutes	**~3–5 times faster**
Wholesaler capacity	Baseline	+25%–40% meeting capacity	**Significant increase**
Data unification	10+ disparate systems	1 unified interface	**Centralized intelligence**
Sales effectiveness	Baseline	High (AI-generated agendas and coaching)	**Marked improvement**

A wide-ranging AI framework for the modern wholesaler

Our AI-powered platform provides an integrated suite of tools that covers the entire sales lifecycle through six core capabilities:

Hyperpersonalized prospecting
Generates personalized prospecting emails based on a client's complete history, helping to deepen engagement. Users can review, edit, and approve before AI executes.

Lead generation
Proactively identifies and scores high-potential leads within a territory, allowing sales to focus their efforts on the most promising opportunities.

Meeting preparation
Slashes prep time by automatically generating tailored agendas and talking points from over 50 unified data sources.

Sales coaching
Features a "digital twin" of clients, allowing junior and senior wholesalers alike to practice their pitch and prepare for challenging conversations.

Real-time meeting support
Acts as a live AI agent during meetings, enabling wholesalers to instantly answer complex client questions (e.g., portfolio exposure) via a tablet interface.

Follow-up automation
Efficiently captures, structures, and pushes meeting notes directly into the CRM and other systems. AI identifies and executes tasks, like sending preapproved emails or creating CRM entries.

[1] "KPMG LLP, proprietary data, 07/30/2026"

Key lessons from AI-powered sales deployments

User experience (UI/UX)

The platform must offer a simple, intuitive interface that integrates seamlessly into the wholesaler's daily workflow to help maximize adoption and satisfaction.

From search to conversation

Training the sales team to "ask" the AI for insights rather than manually searching for data is a critical behavioral shift that unlocks the platform's full potential.

Pilot and learn

Transitioning to an AI agent requires clear communication and a phased rollout that demonstrates tangible value to the sales team at each step.

The new standard: the AI-powered wholesaler

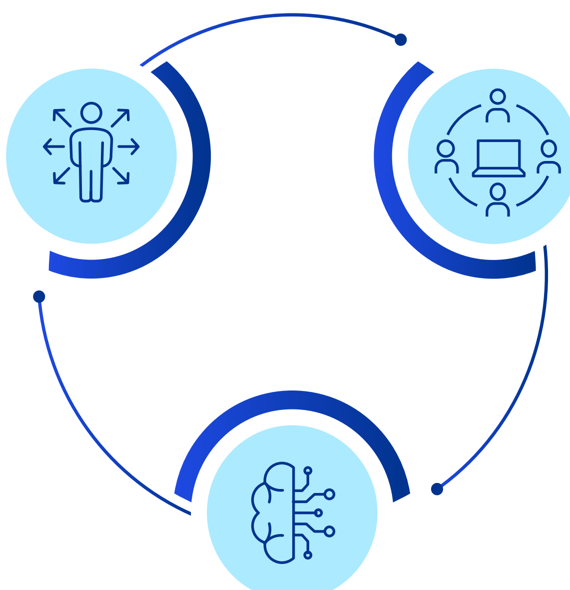
By empowering sales teams to do more with AI, wholesalers can increase sales while creating a more efficient cost structure. AI-driven platforms augment, not replace, the critical human element of sales, freeing professionals to focus on what they do best: building relationships and closing deals. Firms that embrace this transformation are setting new standards for efficiency and effectiveness.

How KPMG can help

KPMG LLP can equip asset management sales teams with leading AI solutions that drive business outcomes.

Deep industry experience

KPMG brings deep experience in asset management distribution, helping firms modernize sales and marketing operating models with AI-enabled solutions tailored to their business priorities. Our teams understand the unique challenges facing asset management sales teams and help translate technology modernization into measurable business outcomes.



Cross-functional capabilities

KPMG combines deep industry knowledge with a global team of AI, technology, operations, and business transformation professionals who help asset managers move from strategy to execution. We have developed more than five AI solutions specific to asset management distribution, helping firms drive measurable business impact across the sales lifecycle.

Leading AI alliances

Our leadership in enterprise AI is strengthened by a robust ecosystem of strategic alliances. Through these alliance relationships, we collaborate closely with leading AI innovators and their technical specialists to develop innovative solutions that help address our clients' most complex business challenges. By leveraging a broad range of AI capabilities and technologies, we help ensure we bring the right solutions to meet each client's unique needs.

Our team

Agnel Kagoo
U.S. Consulting Sector Leader,
Capital Markets
KPMG LLP

Kshitij Agrawal
U.S. Offering Leader,
Asset and Wealth Management
Digital Distribution
KPMG LLP

Natarajan Balasubramanian
AI Lead, Asset Management
Digital Distribution
KPMG LLP

Jonathan Hsiung
Asset Management Lead,
Digital Distribution
KPMG LLP

Some or all of the services described herein may not be permissible for KPMG audit clients and their affiliates or related entities.

Learn about us: **kpmg.com**