



# From Data to Dialogue:

## How AI Helps Portfolio Managers Win Mandates





## Executive Summary:

Client Portfolio Managers (CPMs) sit at the nexus of investment strategy and client communication. To support sales teams effectively, CPMs must clearly articulate the value proposition of their strategies in the context of market dynamics and competitor positioning. This white paper explores how AI can automate and enhance the generation of sales talking points, enabling faster, more targeted, and impactful client engagement.

At Freeman Investment Management Consulting (FIMC), we work with firms across the industry to bridge the gap between data, distribution, and strategic storytelling. Our mission: make sure your best ideas translate into results—through people, process, and execution.

## The Challenge:

### Translating Investment Strategy into Sales Language

#### Role of the CPM

CPMs are responsible for understanding the investment strategy, portfolio positioning, and performance. However, translating this complex, quantitative information into persuasive, client-facing narratives is often a time-consuming task that requires constant updating.

#### Sales Team Needs

Sales professionals rely on CPMs to provide:



Clear differentiators between their strategy and the competition



Market-relative insights (e.g., how the strategy performed versus the S&P 500)



Timely commentary aligned with current macroeconomic events

# The AI Opportunity:

## Turning Data into Dialogue

### Natural Language Generation (NLG)

AI models can automatically transform structured data (e.g., performance, attribution, and risk reports) into narrative summaries. With fine-tuned prompts or templates, these summaries can emphasize outperformance, tactical shifts, and defensive/offensive positioning compared to competitors and benchmarks.

### Competitive Intelligence from Unstructured Data

Natural Language Processing (NLP) tools can scan:

Earnings call transcripts

Fund manager commentary

Marketing collateral from peers to identify messaging trends, positioning, and differentiators, giving CPMs the ammunition to contrast and compete.

### AI-Driven Market Analysis

By ingesting real-time market data and news, AI systems can highlight:

How macro events (e.g., rate hikes, geopolitical risk) affect strategy performance

Tactical moves made by the team to hedge or capitalize on volatility

Relative exposure to sectors/themes versus the benchmark and peers

## Competitive Intelligence + AI:

### A Powerful Combination

The most compelling client narratives don't just explain what your strategy is—they show how it stacks up. AI tools now make it easier than ever to scan fund manager commentary, peer marketing decks, and earnings transcripts to extract competitive positioning themes.

At FIMC, we guide investment teams and sales leaders in using competitive intelligence—sourced from Morningstar Direct, eVestment, and public materials—to feed AI-generated talking points that emphasize your true differentiators.

#### FIMC's Role in Competitive Intelligence

- Identify messaging trends in peer commentary
- Guide teams on how to contrast positioning
- Help structure AI prompts/templates
- Coach CPMs on competitive talking points

### Think:

"Unlike the majority of our peer group, our defensive tilt helped reduce downside risk in Q2."

"While peers increased tech exposure, we rotated into energy ahead of the oil rebound."

These insights can be surfaced in real time, aligned to macro events, and embedded directly into sales materials or CRM workflows—ensuring Client Portfolio Managers have sharper, more strategic messaging at every touchpoint.

# The Application:

## Building Smart Talking Points

The following example illustrates how AI-enhanced messaging can give portfolio managers a competitive edge.

### Automated Talking Point Generator

Using AI, CPMs can input:



Monthly or quarterly portfolio data



Benchmark returns



Peer fund summaries and receive instant talking points, including:

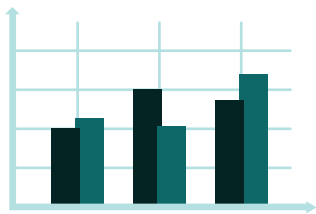


“Our underweight to technology reduced downside risk during the Q1 tech sell-off.”

“Unlike Competitor X, our allocation to energy positioned us to benefit from rising oil prices.”

### Interactive Dashboards for Sales Enablement

AI-powered dashboards can surface:



Real-time comparison charts



Suggested narratives per account type or AUM tier



Performance call scripts tailored to regional market sentiment

## Integration into Workflow



### CRM Integration

AI tools can be embedded within CRM systems like Salesforce to push custom talking points ahead of client meetings.



### Compliance Considerations

By integrating with approved language libraries and compliance rules, AI ensures that all outputs adhere to regulatory and internal guidelines.



### Human in the Loop

AI should augment, not replace, the CPM's judgment. The ideal model includes human review, ensuring strategic nuance and relationship awareness.



# Benefits and ROI

## Time Savings:

CPMs can redirect time from manual report writing to high-value client engagement.

## Increased Sales Effectiveness:

Personalized, timely insights help sales win more mandates.

## Strategic Agility:

Rapid response to market events enables proactive client communication.

## Scalability:

AI enables consistent support across regions and client types.

## Conclusion:

### From Insight to Impact

By embedding AI into the workflow of Client Portfolio Managers, firms can dramatically enhance their ability to arm sales teams with insightful, competitive, and market-aware talking points. This fusion of data science and human insight can elevate both client conversations and strategic positioning in a crowded investment landscape.

## Want to See This in Action?

We've helped investment managers sharpen their competitive messaging, align internal teams, and prep for platform and consultant reviews using this exact approach. Whether you're just getting started with AI or looking to scale your narrative across teams, we'd love to talk.



## Ready to empower your CPMs and sales teams with sharper, AI-driven narratives?

Let's build a system that turns your data and strategy into a competitive edge—without overhauling your team or tech stack.

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