



April 2022

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J.P.Morgan

# How to Outperform as a Corporate Research Professional in 2022 and Beyond

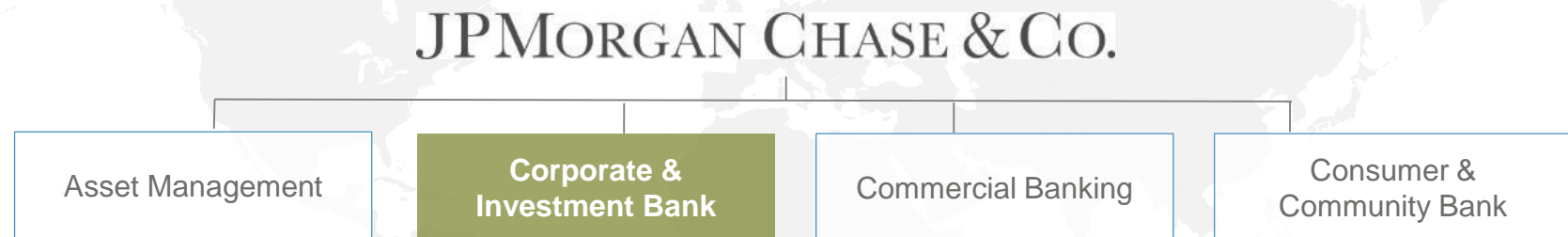
*Michael J. Rosenberg, Managing Director*

J.P. Morgan, Corporate & Investment Bank Strategy

# Background

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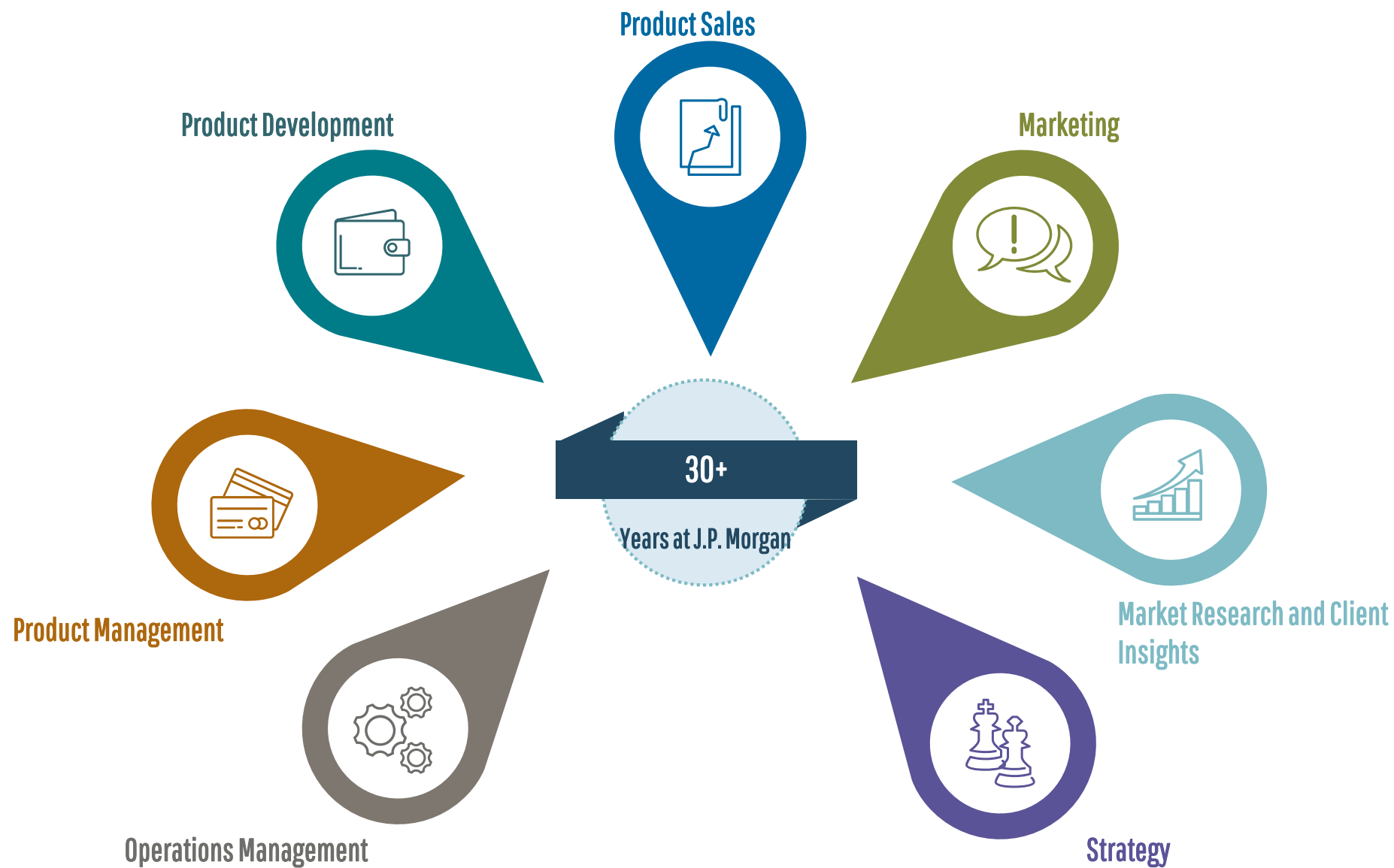
JPMorgan Chase & Co. (NYSE: JPM) is a leading global financial services firm with operations worldwide. JPMorgan Chase has \$3.7 trillion in assets and \$294.1bn in stockholders' equity<sup>1</sup>. The Firm is a leader in investment banking, financial services for consumers and small businesses, commercial banking, financial transaction processing and asset management.



J.P. Morgan's Corporate & Investment Bank ("CIB") offers a broad suite of investment banking, market-making, prime brokerage, as well as treasury and securities products and services to a global client base of corporations, investors, financial institutions, government and municipal entities.

# Introduction

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## Getting to know each other



**Are you a Corporate Researcher or a Business Partner?**

**How long have you been a Researcher?**

**1-5 years**

**6-10 years**

**10- 20 years**

**20+ years**

**Corporate Researchers...where do you sit in your organization?**

**Marketing**

**Strategy**

**Product Development**

**Embedded in the business**



**Do you believe that your clients / stakeholders are *less* demanding than they were before 2020?**

## Demands on Researchers have increased over time

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**Better**



**Faster**



**Cheaper**



**"I can  
get it  
cheaper"**

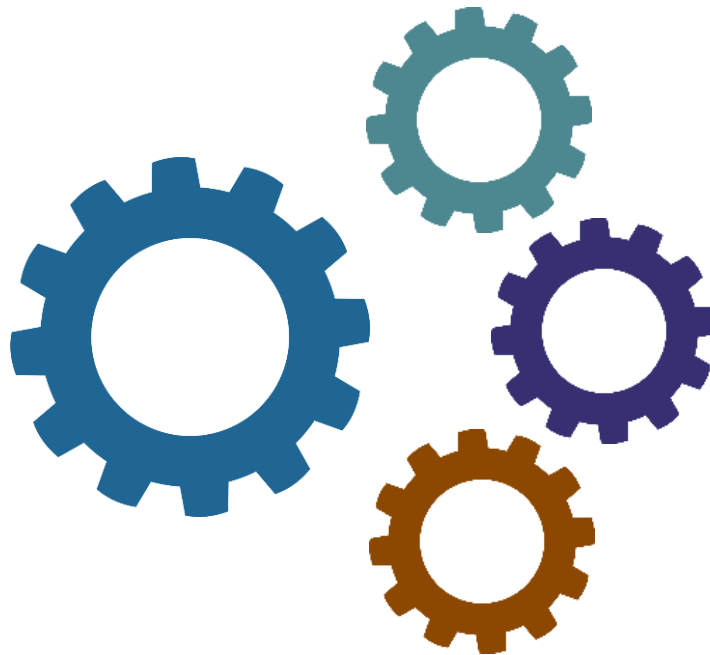
2020 was an inflection point driven by the pandemic

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## Businesses needed...

### Faster Insights

to be able to help them respond to rapidly changing events



## Researchers had to...

**Understand the commercial impact of the pandemic** on their industry, business and clients

**Identify technology alternatives** to reach target audiences

**Engage in strategic conversations** around whether it was the right time to touch clients

As a result, the 'bar' for Researchers was raised...

Deep understanding of the industry, business and clients



Ability to innovate and leverage technology

Strong set of qualitative and quantitative research skills



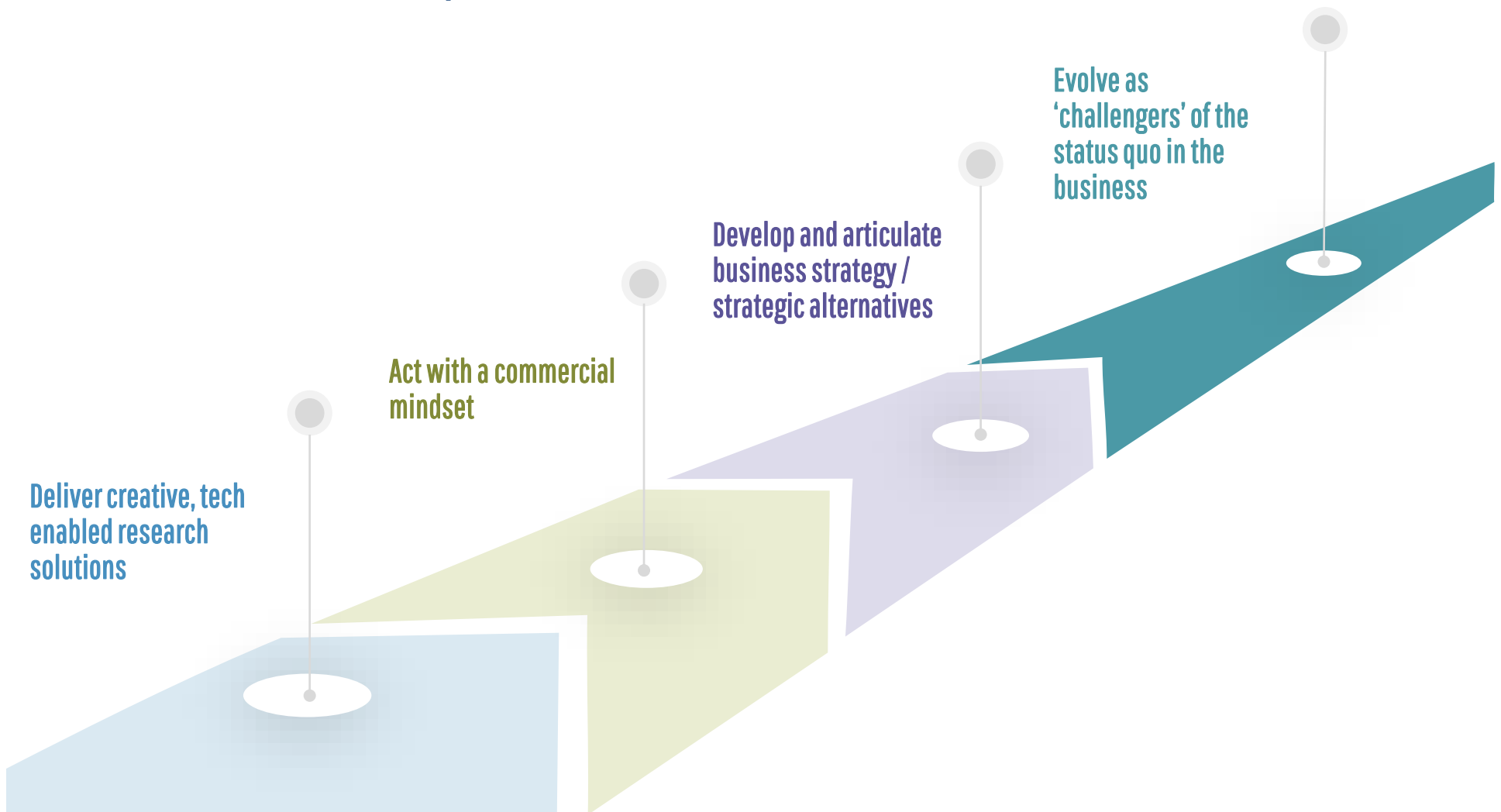
High degree of execution focus



...and then the bar was raised even further

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## Expectations were that Researchers would...



As a result, a more 'responsive' operating model, is no longer sustainable

Pre-2020...



Post-2020...

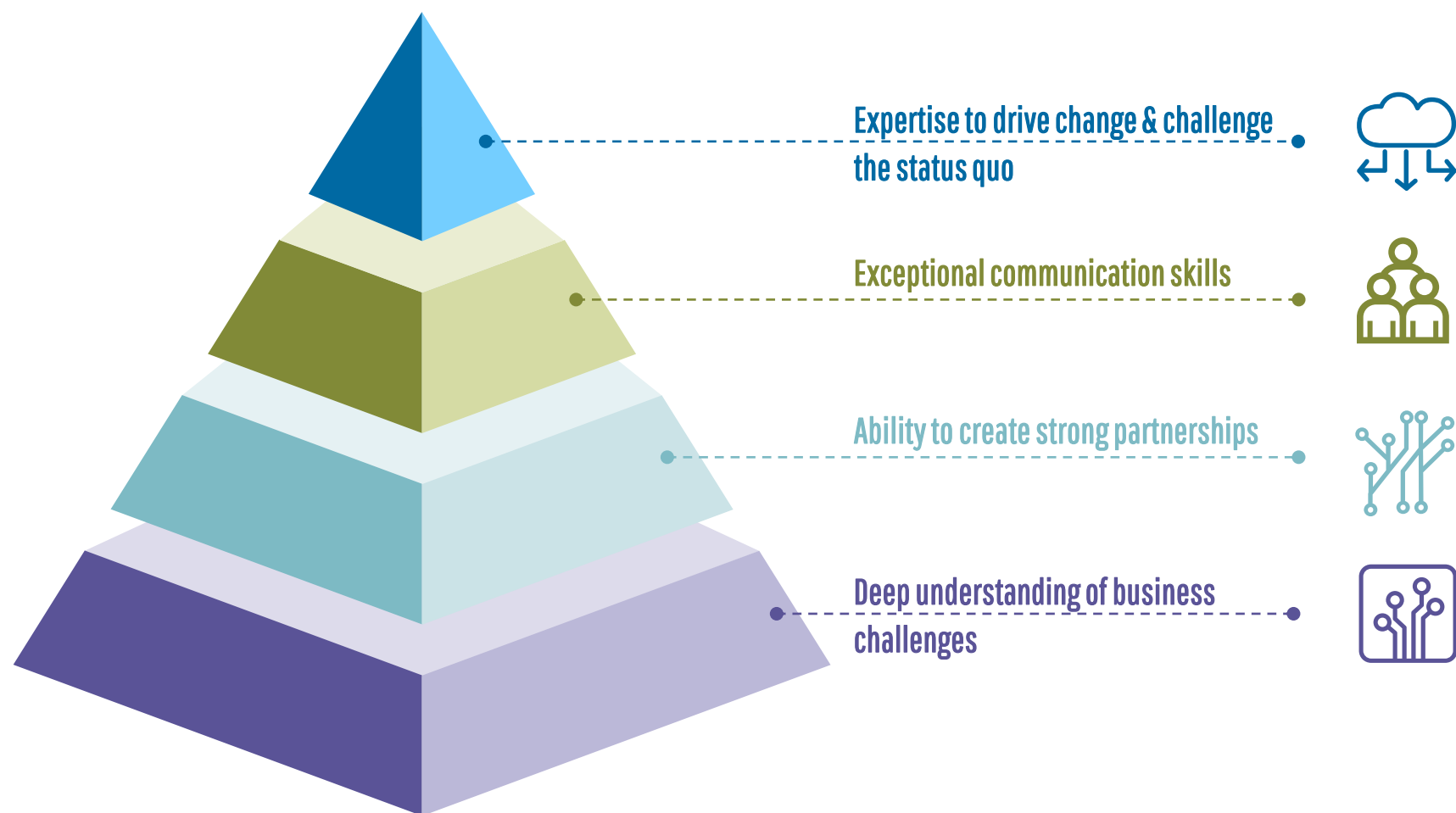


*Obsolescence*

*High Demand*

## Key attributes of a successful Corporate Research professional

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...and we also need to consider which attribute is more important

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Deep practical business  
knowledge

Extensive research experience



Is the answer *different* for managers of Research teams?



....as successful Corporate Researchers will drive change

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## Innovator



## Leader



## Strategist



## Challenger



## Questions & Discussion...

If you'd like to continue the conversation...

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