

We help you use client feedback to drive deeper engagement and uncover growth opportunities among your existing clients.



72% of Engaged clients say being asked for their input is important<sup>1</sup>. But it's also important for your business. An effective client feedback process is about taking stock and demonstrating commitment, but can it also help you:

- drive deeper engagement with existing clients
- · create a differentiated client experience
- streamline service delivery
- identify and connect with clients at risk
- · increase referrals from clients and centers of influence, and

Our core program is designed for individual

advisors or small teams. We help you select

invite clients to participate. Once complete,

you can access in-depth reporting and tools

other advisors on your team we can provide

the best questions for your business and

on your personal dashboard. If there are

both team and advisor level reporting

drive organic growth

## There is no 'one size fits all' approach when it comes to client feedback.

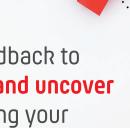
We'll take the time to understand your goals and quide you, and your team, through the process of gathering feedback. And we'll connect the dots between the feedback you receive and the actions you take. To do that, we'll drive the results down to client level and provide you with access to a cutting-edge dashboard with actionable reporting, tools and resources. Your coach will help you create a clear plan of action. The guidance you need and the actions you take will depend, of course, on your needs and objectives. We provide two different solutions to allow you to choose the program that's right for you.

## **Enhanced**

Our enhanced program is designed for larger firms which typically have more complex needs, a separate leadership team and larger numbers of advisors. We work closely with the leadership team and customize a survey to meet your needs, manage the entire process, personalize your dashboard to put the right information in the right hands, conduct an in-depth analysis of your results to share meaningful strategic and tactical insights, share recommendations with the leadership team, and design and execute a program to help your advisors take action.



Core







Absolute Engagement Investor Research 2019

to help you take action.



	Client Insights Core	Client Insights Enhanced
Design	After meeting to discuss your goals, your coach will recommend a survey, drawing from our bank of tested questions.	We'll conduct an in-depth discovery with your leadership team to understand your strategic priorities and customize a survey to meet your corporate goals and the needs of your individual advisors. We may also recommend incorporating other forms of client feedback.
Execute	Access a step-by-step plan to invite your clients to participate, including a recommended invitation.	We'll manage the entire distribution process including personalizing the invitations in the name of individual advisors and sending reminders.
Assess	Access your results, along with helpful tools and resources, on your personal dashboard.	You'll access management, office and advisor dashboards based on the permissions we set. And, we'll go beyond the averages, delivering an in-depth analysis of results across key segments (e.g., gender, age or wealth), a performance snapshot across offices/advisors, an examination of the drivers of satisfaction, engagement or Net Promoter Score and make specific recommendations.
Plan	Meet with your coach to review your results and identify specific next steps.	We'll facilitate a review and discussion with your leadership team, examine the implications for the firm and for individual advisors and provide a recommended plan. We'll also map out a plan to communicate results to advisors based on what is most important and the actions you want them to take on their individual results.
Take Action	Step-by-step plans, resources and tools are available on the dashboard to help you take action.	We'll run, or support, a meeting with advisors to share the results of the survey and deliver a customized program to help them actively use their results with clients. Each advisor will create their own action plan. On-going coaching or training is also available.
Pricing	\$1,345 \$15,000	

Program pricing depends on the number of clients you invite, the scope and structure of the reporting for your team or firm and the depth of support provided. For the core program a further discount may apply if you do not need to work with a coach to personalize your survey.

## **Next Steps?**

Set up a demo to discuss your goals and how this program can support your needs. We'll walk you through the dashboard and the ways you can use feedback in your business and provide you with a clear plan and pricing based on your unique objectives.

Contact support@absoluteengagement.com or call 647.846.7042

