



# Client Insights

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

## Client feedback matters because it matters to your 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
- 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 guide 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.

## Core

**Our core program** is designed for individual advisors or small teams. We help you select the best questions for your business and invite clients to participate. Once complete, you can access in-depth reporting and tools on your personal dashboard. If there are other advisors on your team we can provide both team and advisor level reporting to help you take action.

## 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.

<sup>1</sup>Absolute Engagement Investor Research 2019



