

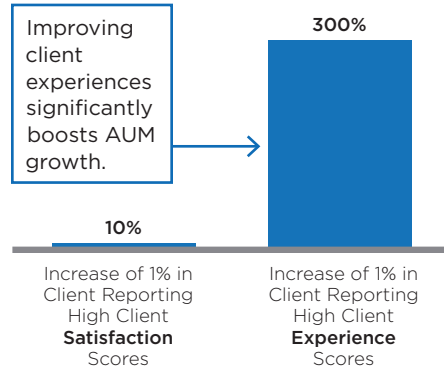


Satisfaction improves client retention, but client experience boosts asset growth.

Improving the client experience drives a 30-time greater increase in AUM growth compared to boosting satisfaction. However, only 44% of wealth managers are confident in their ability to create a high-impact client experience consistently.

Improving Client Experience Boosts AUM

Growth in Assets Under Management (AUM) Based on Satisfaction and Experience Scores



- In wealth management, client experience is largely a function of an advisor’s ability to deliver tailored advice.
- However, two decades of reliable market gains eroded advisory skills, a problem clients feel acutely today.
- That’s why leading wealth management firms improve client experience by investing in the competencies, tools, and processes necessary to help clients achieve their long-term financial and lifestyle goals.

› Answers to Your Questions TODAY

“How can I design an optimal client experience?”

Experience Storyboards—Visually map the end-to-end client experience and achieve organization-wide client understanding across function and product silos.

“How can I ensure advisors deliver consistent client experiences?”

Minimum Experience Standards—Create advice delivery and cross-sell presentation tools that advisors must apply in strategy and performance discussions with clients.

“How can I measure my firm’s client experience performance?”

Client Experience Performance Management Toolkit- Identify attributes of client experience that drive loyalty and link them to advisors’ coaching and compensation.

Contact the Member Support Center for Assistance

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Not a member? E-mail EXBD_Support_FS@executiveboard.com to request information and contact a representative.

FUTURE Offerings

Quantitative Insight High-Net-Worth (HNW) Client Experience Survey

Understand attributes of the client experience that drive loyalty through the Forum’s proprietary survey of HNW individuals.

Diagnostic Anatomy of a World-Class Client Experience

Assess and understand your organization’s strengths and weakness in delivering a profitable experience.

Best Practices on Client Experience Delivery

Create consistently high-quality client experiences across multiple touchpoints to drive loyalty.