

▶ Establishing Client Insights and follow-up as a process in Wealth Management

**“We will only have two sources of competitive advantage:
The ability to learn more about our customers faster than the competition, and
the ability to turn that learning into action faster than the competition.”**

Jack Welsh, former CEO of GE

INFORMATION FACTORY offers an innovative, powerful feedback solution that helps you to continuously improve and to stay on top of mind of your customer.

The traditional approach in market research: operating an annual client satisfaction survey. The results are available only once a year. It does not allow staying in touch with clients appropriately to remain first choice when it comes to their banking needs. In addition, there is often no response on an individual level and little action guidance based on the feedback results.

METHODOLOGY SATISFACTION

- ▶ Trigger client feedback **continuously**
- ▶ Make **feedback 1:1 available** to the respective client advisor
- ▶ **Track follow up actions** of client advisors to the feedback
- ▶ Consolidate feedbacks for **personal and organizational learnings** along the **customer journey**

SUCCESS FACTORS CLIENT SURVEY

- ▶ **...targeted** with defined focus group.
- ▶ **...precise** with tailored feedback questions, specific purpose.
- ▶ **...actionable** with best practice sharing to feedback.
- ▶ **...top-of-mind** with opportunities to get in touch.
- ▶ **... further analysis** for systematic insights.



Customer Satisfaction & Organizational Learning

- ... measure your client satisfaction event triggered
- ... provide your client advisors with opportunities to easily get in touch with their clients
- ... share the best practices

➤ **Information Factory** - Business Consultancy and Software Company.
Business Modell Innovation.