

Critical success factors for client experience programs

Amplifying the client voice in wealth management decision-making

In turbulent times it is more important than ever to listen to client feedback — but it is also business critical to deliver data that serves as a meaningful input to your firm's wider strategy.

Characteristics of best-in-class client insight programs



20%+

survey response rate



5%+

growth in year over year productivity for advisors who improve their client satisfaction scores



100%

engagement from the C-Suite to the back office to the front-line relationship managers

Source: Aon



that effective HNW client insight programs have in common



1

Stakeholder alignment on the importance of this initiative: from senior management, through to the branch office



2

A clear plan for intended use of the insights — how can it influence the business's growth strategy?



3

Linked to compensation and productivity metrics



4

High response rate and robust volume of data



5

Benchmark comparisons to contextualize findings and identify true priorities



6

A survey platform that reflects the brand



7

Granular segmentation of data — not just by region or office, but down to individual advisor



8

Clients treated as stakeholders as the firm makes changes



9

Escalation process for feedback, so clients know they are being heard



10

Connected to training and development

© Aon plc 2020. All rights reserved.

The information contained herein and the statements expressed are of a general nature and are not intended to address the circumstances of any particular individual or entity. Although we endeavor to provide accurate and timely information and use sources we consider reliable, there can be no guarantee that such information is accurate as of the date it is received or that it will continue to be accurate in the future. No one should act on such information without appropriate professional advice after a thorough examination of the particular situation.

AON
Empower Results®