

Critical success factors for HNW Client Insight programmes

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 programmes



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 programmes have in common



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



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



Linked to compensation and productivity metrics



High response rate and robust volume of data



Benchmark comparisons to contextualise findings and identify true priorities



A survey platform that reflects the brand



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



Clients treated as stakeholders as the firm makes changes



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



Connected to training and development

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