



Going Farther, Growing Faster with Client Loyalty Assessments

Do you know how much untapped growth potential is sitting in your current client base?

Would you like to know with greater certainty and specificity which clients will recommend you to others?

Do you know why clients retain you in the first place? What prompts them to leave you?

Do you know how your partners' perceptions compare to those of your clients?

Would you like to change the behaviors of your partners who have grown complacent?

Loyalty Assessments Provide a Clearer View

Many firms use client satisfaction surveys. Just satisfaction surveys. However, this type of feedback doesn't give you the whole picture. Client satisfaction focuses on the most recent transaction, while client loyalty looks at the entire relationship a client has with your firm. Loyalty can be used as predictor of future buying behavior and complements satisfaction surveys -- but they are not substitutes for each other.

Our client loyalty assessment process is an in-depth exploration of your client base. **You'll discover the perceptions, assumptions, misalignment, and areas that require attention.** Our assessments will:

- Reveal the strategic issues your clients are facing
- Uncover additional services your clients want and need
- Identify which clients are likely to refer you to others and those vulnerable to the advances of your competitors
- Reveal how many of your competitors your clients are using
- Identify gaps in perceptions between your clients and your partners
- Provide you with fresh testimonials.
- Pinpoint service improvement opportunities

The payback period can be short and the ROI high. **Save or strengthen just one relationship, and you will more than recoup your investment in an assessment.**

Follow Through is the Key to Growth

Per the Temkin Group's Q3 2013 Customer Experience Survey, 74% of executives said they're good at collecting client experience data, but only 30% of them said they're good at making changes to their businesses based on the insights they've gained. Our clients regularly find that acting on the learnings is toughest part of the process. **But, if you aren't going to make any changes in behaviors or processes, then there's no reason to conduct a loyalty assessment.**

To help you avoid the "paralysis by analysis" trap, in the second phase of our assessment process, we can:

- Work with your partners to develop individual action plans
- Prioritize clients/prospects using a multi-factor model
- Facilitate development of client service plans
- Help firms hold partners accountable for their commitments

Going Farther, Growing Faster

Cycle of Continuous Improvement

