

2008

Extraordinary Strategy

Advisory model strategic transformation.

Transitioning from an asset accumulation service to a full-fledged planning and advisory model requires a comprehensive strategic assessment of market segments and infrastructure support capabilities.



Sales Optimization: Case Study
Customer Research Center



A traditional asset management firm faced significant attrition as clients reached retirement age and demanded full service planning and financial management advice. A holistic set of advisory services, financial planning tools, and access to a suite of both proprietary and third party products was envisioned as the solution. Customer Research Center Partners drove the planning and design for the organizational and technical infrastructure to transition the firm from a proprietary product sales culture to a full-fledged wealth management advisor. Hundreds of customer facing and back-office processes were streamlined. Coordinated investments across distribution channels, including call centers, web-based, and face-to-face field sales were made. A tiered training program, combined with a set of pragmatic operational and performance metrics were keys to aligning service delivery to the firm's core commitments to its clients.

Customer Research Center

Experts in
sales process
optimization.

“The pilot study reinforced the initial design. Nearly 70% of pilot participants viewed the services as valuable. Clients overwhelmingly preferred this service experience compared to other third party advisors.”

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