WHAT CLIENTS WANT

Clients today expect the same kind of hyper-personalized, data-driven experiences they get from the likes of Netflix and Amazon. Getting this right means the first time and channel along the client journey is critical to building trust and credibility. Webinars, interviews, and executive research discussions help in understanding what the 64% of clients expect.

LEARN FROM LEADERS

Embracing the strategies and tools that can power loyalty and growth. Our research and interviews with industry leaders highlight the strategies and actions that are working now to drive client-centric success in the future.

ACCELERATE YOUR CLIENT-CENTRICITY JOURNEY

Embracing a structured approach centered on four broad steps to implement a new strategy can speed the transformation.

EMPHASIZE DRIVERS AT THE RIGHT PLACE IN THE CLIENT LIFECYCLE STAGES

A driver can be very important to one stage of the client lifecycle and play a small role in another. Understanding when and where in the client lifecycle a driver is most impactful can ensure that funding and attention is targeted on areas with the greatest potential.

FIVE CLIENT-FACING DRIVERS

Embracing the strategies and tools that can drive client loyalty and growth.

FIVE BACKSTAGE ENABLENERS

Strengthening the behind-the-scenes capabilities to deliver on the promise of those client-facing drivers.

Download report

Learn more about wealth management trends and the latest research from Deloitte Global Client Care.

GETTING PERSONAL

The growth in wealth management industry is driven by client-centricity growth in wealth management firms. We look at four key lifecycle stages.

Loyalty, a crucial component of the wealth management business, can still be won, but the terms and tools of relationship-building have changed. Firms that are further along on the client-centricity journey focus on four key areas.

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