

Increasing Assets Under Management and global customer satisfaction. A global private banking story.

In today's ever-changing and fluctuating global financial marketplace, it is crucial to stay in touch with the needs and desires of customers and prospects. This requires an in-depth understanding of what drives their financial decisions, what they are seeking in terms of products and services from their financial institution and what they were looking for in their interactions with their relationship managers.

A quantitative research survey was conducted across 2 continents, 5 countries utilizing consistent measurements from country-to-country, year-to-year, over a period of 6 years.

Key findings from this research centered on identifying the actions, policies and products of greatest appeal to customers and prospects and their "must haves" from their Relationship Management teams.

Insights from the research were used by our client to:

- Train Relationship Management teams,
- Provide even greater customized service to their clients
- Update product offerings
- Create new marketing and promotion initiatives
- Re-evaluate communications globally and by individual markets

