

WHERE DO WE NEED IMPACTFUL INNOVATION THE MOST?

Based on the Asset-Map Customer and Advisor Journey Survey, these ten milestones were indicated as the most memorable stages of the respondents combined experience. Consider ranking your firm's intentional efforts in each of these stages. Focus on the lowest three scores and consider innovation in these areas. Need ideas? Visit us at www.asset-map.com/journey to learn current technologies and processes to consider now. Be honest with yourself—what score would your customer give you (1-10)?

1. INTRODUCTION

First Impressions

We manage the first impression of our brand, people and firm.

(Website, LinkedIn page, online reviews, office & reception area)

Scheduling

Scheduling/rescheduling meetings with our professionals are consistent and efficient.

(Online scheduling, calendar invites sent, reminder emails, clear & easy to follow directions)

2. INTERACTION

Meeting Environment

We create an environment that builds trust and competence in our client interactions.

(In-person, at office or client's home, remote meetings, printed reports vs digital, proposals or other tools)

Data Collection

Our collection of client data is efficient, consistent, uninitimidating and secure.

(Paper vs digital fact-finder, Is it interactive?, page count)

3. GUIDANCE

Analysis

The tools we provide to our professionals are integrated for data efficiency and are consistently adopted by field professionals.

(CRM—Planning—Portfolio management tools integrated, simple presentations, reports, ease of use)

Recommendations

Our proposal experiences truly add value to the client and are easy to digest/communicate.

(Proposals, illustrations, interactive applications, visual vs. tabular, jargon-free)

4. IMPLEMENTATION

Implementation

We make it easy for our customers to execute new business with us.

(Paper apps or or digital, modern payment methods, time to completion)

Transparency

Our clients and advisors have a clear understanding of where they stand and what it costs in the implementation process.

(Application status tracking, clear disclosure, fee transparency)

5. RELATIONSHIP

Service Delivery

It is easy and efficient to service client accounts through our human or digital self-service outlets.

(Relationship portal, website, support center, advisor access, performance reporting)

Ongoing Engagement

We support ongoing client engagement with additional value-added content and resources post origination.

(Content, vaults, educational opportunities, time-of-Life support)

ACTIONS

Add up all of your scores and write it in the box to the right. Circle the lowest 3 scores and determine if innovation can be introduced at the firm level. Who knows the solution internally? Watch our video assetmap.com/journey

CUSTOMER JOURNEY SCORE

RESULTS:

- 75+** Look for micro innovations 😊
- 50 - 74** Let's make some big moves 😐
- < 50** Time to examine the firm culture 😞