



CHALLENGE

A financial advising company specializing in helping families manage their money and reach their financial goals wanted to understand how they were viewed by their clients and collect customer suggestions on how they could improve. The challenge was simply to gauge how the company's clients felt, especially with recent changes to how they conducted client relations.

SOLUTION

The objective was to create a survey that would help our client understand current customer satisfaction (CSAT) with their services and to identify any areas of strength or potential improvement. Vennli worked with this client to develop a CSAT survey to pinpoint those areas of interest to their clients. This allowed clients to share their experiences with the financial advising group, both negative and positive.

KEY INSIGHTS TO DRIVE ACTIONS

Overall, the response from the survey was overwhelmingly positive. Customers reported being very pleased with the care and services from the client and indicated a high performance on choice factors important to customers. Additionally, respondents noted the company as being “responsive, helpful, and going above and beyond”. The survey also identified how some respondents felt the client was not always receptive, how they could be more definitive with financial advice, and the desire for expanded investment options. Through both the positive and negative responses, Vennli was able to provide insights that gave the client the idea for subsequent efforts to keep their customers satisfied and areas of potential growth.

Importance (Top 2 Box %)	Choice Factor	Family Office Association (Top 2 Box %)
98%	I trust them in their work for me	97%
97%	Respond quickly to my questions and requests	96%
95%	Thoroughly understand my financial needs and goals	92%
94%	Investment solutions meet my goals and preferences	88%
93%	Services I receive represent a good value	93%
92%	Provides clear advice	91%
92%	Provides proactive client service	91%
83%	Ease of access to account balances and statements	82%

Performance Scale



RESULTS

By conducting this survey, Vennli’s client was not only able to understand their areas of strength, but also address their customer’s concerns. Using CSAT metrics, the client could quickly tackle these issues to keep building momentum and growth - and improve in any areas of interest.