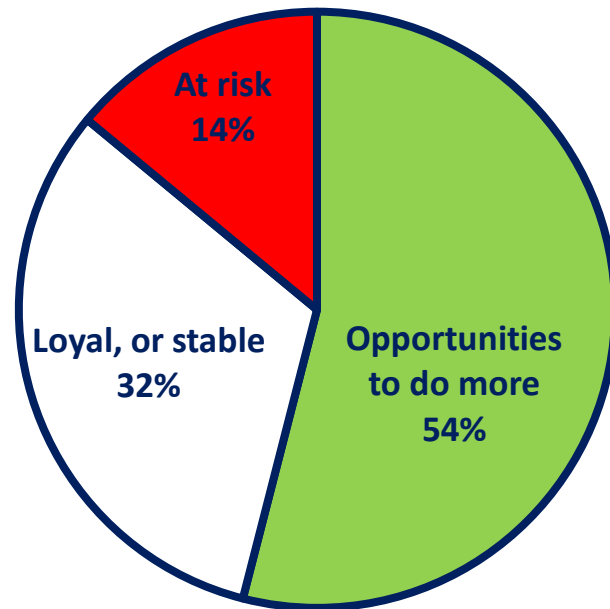


improving results from business development and marketing:

client research market research crm consultancy mystery shopping training employee surveys online surveys benchmarking client acquisition and development

Uncovering opportunities

Client feedback and uncovering client status



This chart summarises the status of clients that have provided feedback (in the processes Thriving administers) to their professional advisor, from January 2014 to March 2015.

Perhaps the improving economy has helped, but it is striking that in over 50% of cases, there is at least one opportunity for the firm to extend what it does with that client.

Of course, some of this may well have been uncovered by other dialogue, but much of it would not, unless the firm was actively pursuing ongoing dialogue with all clients.

As another 14% of relationships were “at risk” – defined as where there is a significant possibility that the firm might lose all or part of the business it gains from that client, it demonstrates that in nearly 7 out of 10 cases, gaining the client opinion has a direct and fairly immediate financial result.

This is worth considering for any firm which does not currently have a rigorous feedback process, or one which is not currently driving a direct financial return