actionconsulting

Management Consultancy

Client insight

Action Consulting is a research-based consultancy that helps professional services businesses to improve the loyalty of their customers, the performance of their staff, and the effectiveness of their marketing and service propositions.

Our blend of research and analysis helps our clients to understand what is driving and impeding performance, and how to deliver and measure sustained improvements.

Getting value from client feedback

Your clients are the core of your business, and what they buy from you is reassurance and service. So what is it about your service that impresses them most, and what does not?

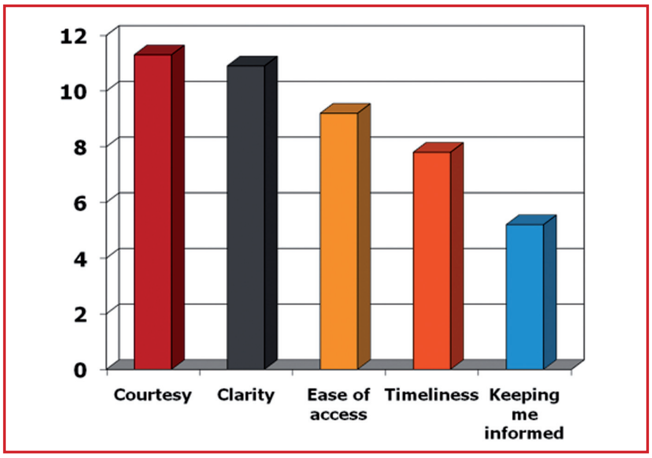
A Client Insight programme can identify which aspects of your service really add value for your clients, and which disappoint them. The results can be surprising.

We can also show how loyal your customers are, and what business you might be missing out on. We can even show you how you compare with other similar businesses.

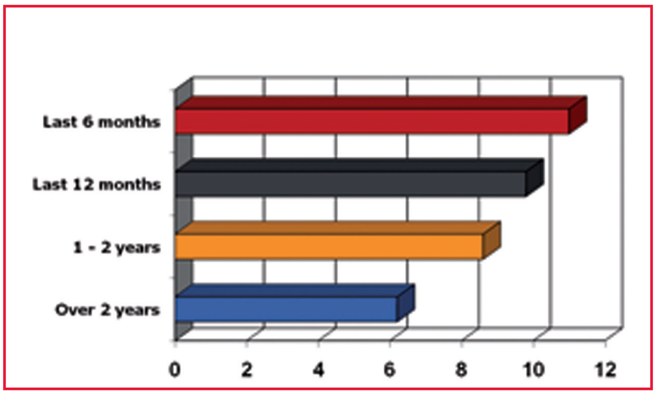
In the short-term you will:
- Generate new business enquiries from existing clients and
- Identify potential sources of referrals

In the longer term, you will improve customer loyalty – clients appreciate being asked for their opinions – and you will gain valuable insights into how to improve your service, and build differential service propositions for key segments of your client base.

How your customers rate your service



How well your customers rate you, depending on how recently you last contacted them



research = understanding = planning = action = success

How the programme works

The programme is based around a client feedback questionnaire which we customize to your requirements. This can either be in your livery, or, to obtain potentially more objective feedback, in ours.

The questionnaire captures your clients':

- ratings of their recent experience
- service priorities
- likely future needs for advice
- contact preferences.

and the likelihood of them referring your service to others.

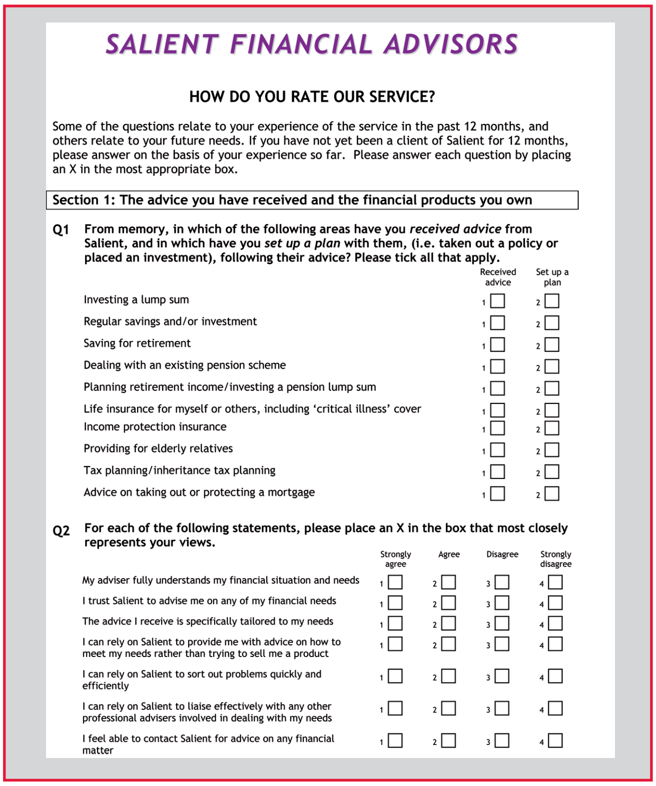
The results can be analyzed by a range of criteria including age, income bracket, employment status and the business they currently hold.

We will translate the findings of the research into specific action plans and measurable outcomes. We can then work with you to put them into action, for we are not primarily interested in writing reports or giving presentations, but in helping our clients to change things. To bring about tangible and lasting performance improvements.

And more importantly, to help to improve the profitability, sustainability and value of your business.

If you would like see a sample presentation from a Client Insight programme, and hear more about how it could help improve your business call us on 01462 813020 or email enquiries@actionconsulting.co.uk.

Sample questions from a customizable questionnaire



SALIENT FINANCIAL ADVISORS

HOW DO YOU RATE OUR SERVICE?

Some of the questions relate to your experience of the service in the past 12 months, and others relate to your future needs. If you have not yet been a client of Salient for 12 months, please answer on the basis of your experience so far. Please answer each question by placing an X in the most appropriate box.

Section 1: The advice you have received and the financial products you own

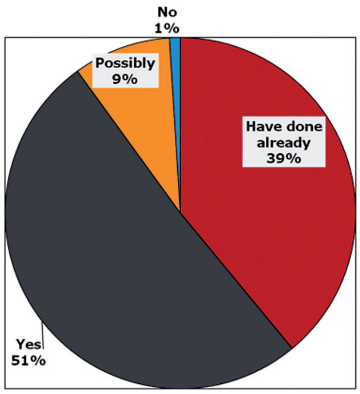
Q1 **From memory, in which of the following areas have you *received advice* from Salient, and in which have you *set up a plan* with them, (i.e. taken out a policy or placed an investment), following their advice? Please tick all that apply.**

	Received advice	Set up a plan
Investing a lump sum	1 ☐	2 ☐
Regular savings and/or investment	1 ☐	2 ☐
Saving for retirement	1 ☐	2 ☐
Dealing with an existing pension scheme	1 ☐	2 ☐
Planning retirement income/investing a pension lump sum	1 ☐	2 ☐
Life insurance for myself or others, including 'critical illness' cover	1 ☐	2 ☐
Income protection insurance	1 ☐	2 ☐
Providing for elderly relatives	1 ☐	2 ☐
Tax planning/inheritance tax planning	1 ☐	2 ☐
Advice on taking out or protecting a mortgage	1 ☐	2 ☐

Q2 **For each of the following statements, please place an X in the box that most closely represents your views.**

	Strongly agree	Agree	Disagree	Strongly disagree
My adviser fully understands my financial situation and needs	1 ☐	2 ☐	3 ☐	4 ☐
I trust Salient to advise me on any of my financial needs	1 ☐	2 ☐	3 ☐	4 ☐
The advice I receive is specifically tailored to my needs	1 ☐	2 ☐	3 ☐	4 ☐
I can rely on Salient to provide me with advice on how to meet my needs rather than trying to sell me a product	1 ☐	2 ☐	3 ☐	4 ☐
I can rely on Salient to sort out problems quickly and efficiently	1 ☐	2 ☐	3 ☐	4 ☐
I can rely on Salient to liaise effectively with any other professional advisers involved in dealing with my needs	1 ☐	2 ☐	3 ☐	4 ☐
I feel able to contact Salient for advice on any financial matter	1 ☐	2 ☐	3 ☐	4 ☐

Would your customers refer you to others?



Action Consulting was established in 1995 and all our early clients came from the financial services sector including firms of accountants, IFAs, life insurance companies and reinsurance businesses. Since then, we have diversified through applying skills and expertise gained in one market to other comparable businesses, and through recommendations from satisfied clients.

As important as what we do is the way that we do it. Through a real involvement with your organisation and its people, Action Consulting offers a bespoke service to help improve your understanding of, and response to, issues that affect your business. Most importantly, we work with you to put those decisions into practice. For recommendations and proposals do not improve the bottom line. Actions do

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