



Accomplish

Complete your business intelligence



The power and uniqueness of behavioral benchmarking

Because actions speak louder than words

Actions speak louder than words

Humans are tricky creatures

On its own, what clients say (feedback) will contain gaps and inaccuracies

- X They are inundated with requests, leading to low response rates
- X The words of a few may not be representative of all
- X At its heart, it is low-resolution data and can be analogue
- X Infrequency creates lag times and reduces its effectiveness
- X Humans forget less recent events, we avoid difficult conversations, and what we say can dramatically contradict what we do ^{1,2,3,4}

1. FeldmanHall, et al, 2012. What we say and what we do.
2. Tversky and Kahneman, 1974. Judgment under uncertainty.
3. Shafir, Simonson, and Tversky, 1993. Reason-based choice.
4. Cooper, Heron, and Heward, 2020. Applied behavior analysis.

"This way of thinking is helping us transform our business."

A global head of post-sale service.



Measure what clients do (behavior) to counteract the weaknesses of feedback data

- ✓ Behavior is general and universal, leading to a complete picture
- ✓ Digitally available in high-resolution
- ✓ Measurable over any timeframe
- ✓ Zero client disruption
- ✓ Unaffected by innate conflict-aversion and memory biases

The winners will complete their business intelligence with behavioral benchmarking

Client experience is an 'effect' you 'cause'

Operational /
service
performance
'Cause'



'Effect'

**What
clients say**

Client feedback

- Client satisfaction data
- Industry client surveys
- Net promoter scores

Client behavior

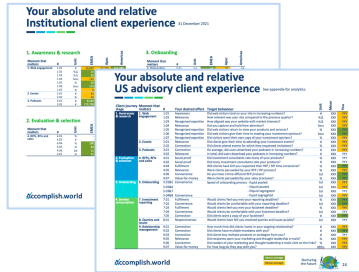
- How much time did clients give to your thought leadership, events, and meetings?
- What level of social proof do you command from third-parties?
- What proportion of opportunities did you convert into revenue?
- Did clients buy multiple products from your firm?
- For how long do they stay with you?



Measure, compare, and predict your effect on client behavior

"This is exactly the type of data we've been looking for. And what is really compelling is that we, the users, own it."
A Head of Analytics and Insights

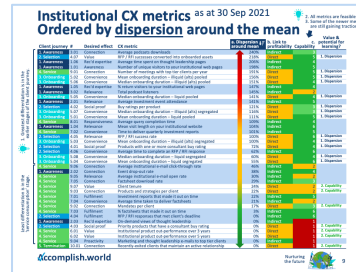
View your end-to-end client experience



Prioritize

- ✓ Highlights and lowlights at-a-glance.
- ✓ Filter results by different factors:
 - Client segment
 - Region
 - Behavioral effect

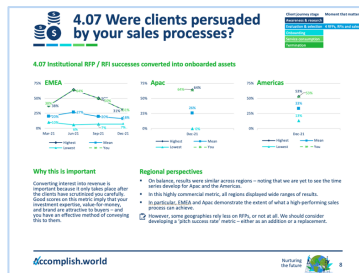
Keep things in perspective



Discover

- ✓ Areas of greatest differentiation.
- ✓ Links to profitability.
- ✓ Impact on your client journey.

Drill down into target behaviors



Geek out

- ✓ Intuitive visualizations.
- ✓ Specialist narrative on the average, range, and different ballparks firms are in.
- ✓ Identify relationships between different touchpoints.
- ✓ Check the meaning and importance of each metric.
- ✓ Seasonal variations.

Stakeholders across the client journey

Awareness & research	Head of Marketing Chief Investment Officer	Heads of: <ul style="list-style-type: none"> ▪ Distribution ▪ Business Intelligence ▪ CX
Evaluation & selection	Sales Directors	CEO
Onboarding	Heads of: <ul style="list-style-type: none"> ▪ Onboarding ▪ Reporting ▪ Relationship Management ▪ Client Service 	Non-Executive Directors
Service consumption		
Termination	Chief Investment Officer Heads of Relationship Management	

Independent second opinion



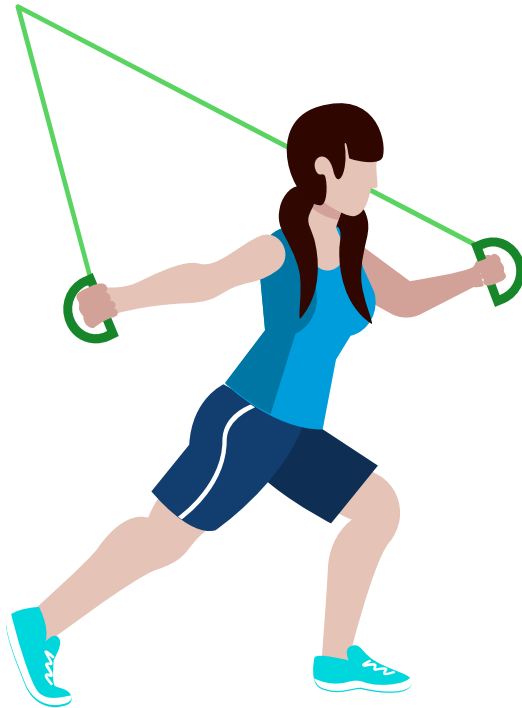
- Data interpretation sessions
- Accomplish's observations and hypotheses based on your latest quarterly data
- Strengthen your own conclusions



How asset managers are using behavioral benchmarking

"Now they can see CX in a tangible form, our teams across the business have really engaged in the topic."
A Head of Client Experience.

Understand their behavior



Complete your business intelligence

- ✓ Measure and compare your clients' behavior.
- ✓ Combine with feedback and satisfaction data.
- ✓ Create a 360-degree view of your clients.

Manage and improve the different aspects of your CX

- ✓ Find out if you had your desired effect, e.g. ease of doing business.
- ✓ Play to your strengths by knowing where you are above and below average.
- ✓ Set measurable objectives by forecasting our effect on client behavior.

Optimize for behavioral differences

- ✓ Across clients in different regions.
- ✓ Between one client segment and another.
- ✓ Inside your organization.

Connect your distribution strategy

- ✓ Marketing, sales, and service are about encouraging observable and measurable behaviors in our clients.
- ✓ Design distribution strategies to encourage specific behaviors.
- ✓ Monitor connectivity and consistency across your organisation.

Alleviate clients' survey fatigue

- ✓ Analyze your clients' experiences without disrupting them.
- ✓ Consult them in an informed way and discuss your findings and plans with them.
- ✓ They gain superior experiences for less effort.

Deliver what they want

Vital and previously unavailable business intelligence

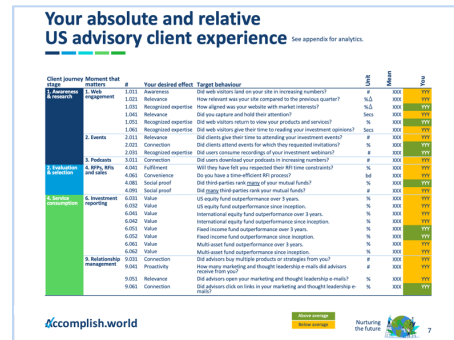
"Without metrics, we have nothing on client experience."



A Non-Executive Director.

Option 1 (free)

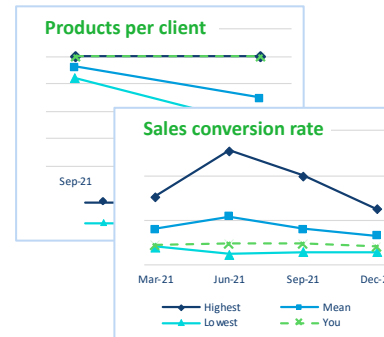
Different lenses on your client experience



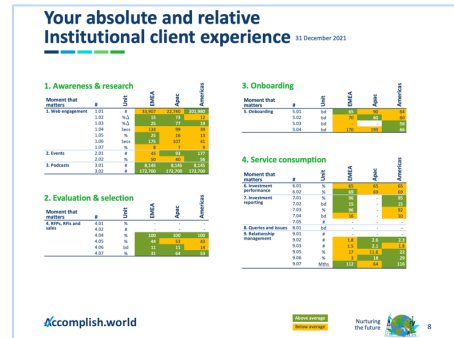
This firm monitors its effect on its clients in a specific market segment.

Option 2 (premium)

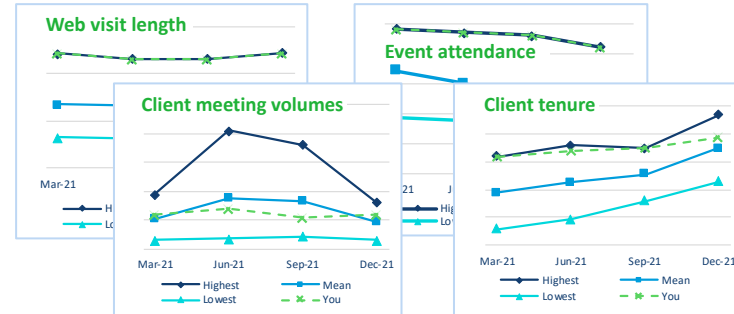
Is your distribution strategy connected?



This firm has a sales problem. It would prefer to 'dilute' its products per client with more inflows of new single product relationships.



While this one looks for strengths and weaknesses across its global operation.



The Head of Distribution is delighted – efficient use everyone's time and an above-average client tenure.



The power and uniqueness of behavioral benchmarking

Accomplish – setting a new standard

	Accomplish	McKinsey	Alpha FMC	Market Metrics	Greenwich Associates	Client satisfaction surveys ¹	Net Promoter Score
Aligned to specific client segments?	✓ AMs' institutional and advisory relationships	✓ Advisor / asset manager	✓ Asset / wealth managers, and insurers	✓ Advisors and insurers	✓ Industry-wide client survey	Industry-agnostic method	Industry-agnostic method
Are they measuring client experience (CX)?	✓ Client behavior	Pricing, incentives, & economics	Operations & client service = cause, not effect	✓ Client feedback	✓ Client feedback	✓ Client feedback	✓ Client feedback
Objective or subjective data?	✓ Objective data	✓ Objective data	✓ Objective data	Feedback is subjective	Feedback is subjective	Feedback is subjective	Feedback is subjective
Will the approach yield a complete dataset?	✓ Data is general and universal	⚖️ It depends on the goal for their research	⚖️ It depends on the goal for their research	Feedback is exposed to low response rates & selection bias	Feedback is exposed to low response rates & selection bias	Feedback is exposed to low response rates & selection bias	Feedback is exposed to low response rates & selection bias
How fresh are the insights?	✓ Quarterly	User specified schedules	Annual	✓ Quarterly	Annual	User specified schedules	User-specified schedule
Are they free from conflicts of interest?	✓ Pure-play benchmarking	A management consultancy	A management consultancy	They have a consulting arm	They have a consulting arm	Some do Some don't	Owned by a management consultancy
Who is in charge of the b'mark?	✓ The asset managers	The provider	The provider	The provider	The provider	The provider	The provider
Price	Two levels: free; or ~\$50k p.a.	Not public	Not public	Not public	Not public	Prices vary	Not public



✓ Accomplish



Appendix

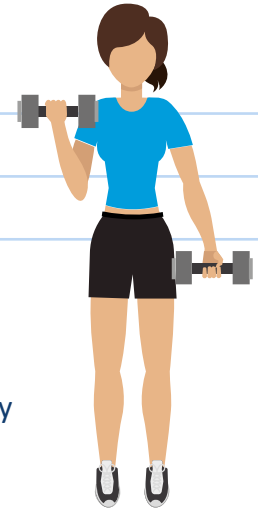


Nurturing the future

Ways to engage



Feature	Option 1: Just start measuring CX for free	Option 2: Become a premium client
Pull the Helix© off the shelf and start measuring immediately in a way that you will be able to compare against your peers	✓	✓
How many client segments?	One	Multiple
How many regions?	One	Multiple
Scale of access to analytics:		
Breadth?	Just 'snapshot' data: <ul style="list-style-type: none"> At a point in time Average Range and ballparks 	The full time series: <ul style="list-style-type: none"> Industry trends Seasonality Quarterly variability
Depth?	Just the metrics to which you contributed	All metrics
Access to Accomplish's online analytics platform?	✗	✓



The strong are getting stronger

Team Accomplish



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