

Laying the ground for CX Conversation points

Having a favourable CX isn't discretionary

- **Would we invest in a tech firm that had no UX?**
- **Competition is intense so we need to stand out**
 - Product performance is risky and shouldn't be our only differentiator.
 - CX is controllable, commercial and incremental.
- **There's an industry-wide issue with CX**
 - This creates either an opportunity or a threat depending on our choice.
 - As other firms move on CX, staying 'in the pack' will become less and less credible.

We should build goodwill *before* we need it

- **We should sweat the small stuff**
 - Most clients don't understand the technical aspects of what we do.
 - So they can only judge us by the areas that they do.
- **We will need trust for the next time investment performance comes off the boil**
 - Investment performance is risky and has become commoditised.
 - Service performance (CX) is controllable and builds trust.
 - Trust can buy us time to solve a problem. Time = revenue retention.

Quicker and better decisions deepen relationships

- **Clients' needs change over time**
 - Don't get tethered to their needs as you once understood them
 - CX data and analytics will keep you close to them
 - It will identify instantly where you need to defend or attack
- **Clients are people. People love to be listened to. That's CX.**
- **CX makes us better at our jobs**
 - Segmentation enables more targeted prospecting
 - Trust in the basics protects revenue
 - A coherent and efficient client journey is operationally efficient

We can now measure client centricity and, on average, the foundations are not in place.

