

Compare your 'effect' on your clients behaviour

"Behaviours were the missing piece for us. We were already tracking our own performance and what clients say about us. Now we can also track and compare our effect on what clients actually do." A Head of CX.

CX is an 'effect' you 'cause'

It occurs in **what clients do** (behaviour) and **what they say** (feedback). But what humans do can **dramatically contradict** what they say. If you want the true story, **measure their behaviours**.

See the wood for the trees



- Moments that matter across a B2B client's investment journey
- Leading indicators signal emerging trends
- Evaluate your CX initiatives

A much-needed behavioural benchmark

Operational / service performance
'Cause'



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Defining 'B2B CX data' is complicated and you will want to know how your numbers compare. So, we designed the best-practice taxonomy of CX metrics and built a benchmark around it. **Save time and effort** by pulling it off the shelf. Begin measuring CX immediately. **Compare, predict, and influence** your effect on clients' behaviour.

CX Touchpoint Benchmark – designed for asset managers by asset managers¹