

# How Modern Client-Facing Professionals Exceed Client Expectations

INFOGRAPHIC

Today's client-facing professionals in financial services spend an average of 11 hours on each individual client, every single year, prepping, presenting, and following up on meetings.<sup>1</sup> They're tasked with finding ways to increase productivity while also delivering better client experiences. Let's dive into the data to see how it's possible to equip your client-facing team to do both.

## Clients and client-facing teams expect more

**66%** of high-net-worth investors desire increased personalisation in their wealth management relationship.<sup>2</sup>

**9 out of 10** clients say frequency of advisor communication and information sharing plays a big role in their likeliness to stay with them or make a referral.<sup>3</sup>

**76%** of clients believe that meeting with their financial advisors on a regular basis is essential for maintaining trust and confidence.<sup>4</sup>



## Is your team prepared to meet modern client needs?

Impactful meetings are the best way to build trust and deepen client relationships. So, how can you empower your client-facing team to optimise them?

### Prep smarter, not harder

**71%** of clients expect personalised experiences.<sup>5</sup>

#### EXPERT ADVICE

Use Seismic to automate a personalised pitch deck, assemble a content playlist related to your client's specific needs and goals, and get the just-in-time coaching you need to impress in every meeting — ensuring even meeting content is compliant.

### Present better

**76%** of wealth management leaders say that improving the client experience is vital.<sup>6</sup>

#### EXPERT ADVICE

Let Seismic for Meetings manage the notetaking, so you can focus on delighting your clients and addressing any question or objection with ease. Didn't see one coming? AI-powered search saves the day with the answers you need, right when you need them.

### Follow up faster

**73%** of clients said being proactive in anticipating their needs is a top attribute they seek.<sup>7</sup>

#### EXPERT ADVICE

Seismic for Meetings captures key topics, action items, objections, and AI-recommended content based on the conversation and content shared in the meeting. Address those action items and follow-up quickly with relevant content via the client's preferred communication method, so you never lose momentum.

<sup>1</sup> Kitces Report

<sup>2</sup> PWC

<sup>3</sup> YCharts

<sup>4</sup> CFA Institute

<sup>5</sup> McKinsey & Company

<sup>6</sup> Capgemini

<sup>7</sup> Deloitte

Ready to master modern client engagement with Seismic?

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