

NEW

Customer Value Tracker

Understand how your customers think you are doing when it comes to delivering value

Add customer insights into your Board reporting and metrics

Understand your relative strengths and weakness and monitor performance

Every quarter we will be asking 2,000 fund investors (both intermediated and self-directed) about the value they feel they are being delivered by asset managers.

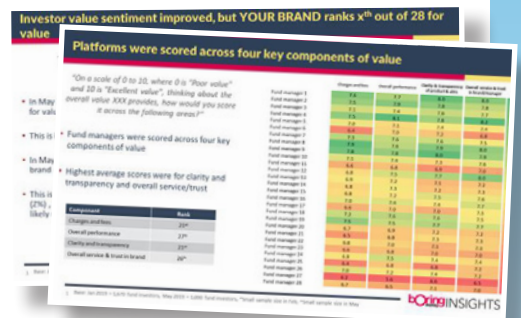
The quarterly report will provide:

- A % score for those customers who say that you deliver good value
- A relative ranking compared to peers
- How both have changed over the last 4 quarters*
- Verbatim insights about why investors think that your brand either does or does not offer good value, and comparison against up to 6 named peers
- A breakdown of how your firm scores for each of the 4 main component parts of value that our research has identified, namely performance, price, clarity and service

This report will provide boards and management teams with:

- A customer value % score
- A market ranking for value
- A score for the various component parts of value along with a relative market ranking
- Verbatims and insights to reinforce the data and add more detail to the picture
- Peer group comparisons

We are also conducting more extensive work for asset managers who want more detailed insights into their value assessments and reporting – please contact us to discuss how we can help.



"Always keeping me up-to-date through various communication channels."

"It's very straightforward and honest."

"Reasonable charges, good return."

"It hasn't done what I was expecting."

This report costs from £3,750 per quarter. Please contact jim@boringmoney.co.uk for details.