

# NEWS

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Julie Littlechild  
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## Advisor Impact, Inc. Launches Enterprise-Level Client Feedback Tool for Advisors

(June 23, 2009) -- New York, NY – Julie Littlechild, President of Advisor Impact, Inc., is now introducing **Client Audit: Enterprise**, an enterprise-level technology that provides advisors with the tools and support to gather and use feedback to build deeper relationships and increase revenue from existing clients. “For the first time, advisors with firms that offer this solution will have access to a tool that will allow them to gather and then use feedback, easily and inexpensively,” says Littlechild. “The firms offering this technology will be on the cutting edge in terms of advisor support by providing access to a tool that has a direct impact on both the depth of client relationships and the bottom line.”

Advisor Impact has worked with more than 1,000 individual advisors and gathered feedback from more than 70,000 clients over the past few years. They recognized the value to corporate clients to be able to integrate this feedback functionality into their existing advisor offering and to streamline the process at a time when cost-effective solutions are an absolute necessity. “Client Audit: Enterprise maintains what has worked – the ability to customize surveys, access to rich benchmarking data, client-level reporting and a robust suite of tools to help advisors leverage the results – and packages that into an easy-to-use tool that advisors can access directly from the firm’s desktop or intranet,” says Littlechild. “The good news is that we’ve cut the cost of accessing a traditional client feedback program by more than 75%.”

Client Audit: Enterprise adds value for advisors, and at the same time drives growth and reduces attrition corporately. Broker-dealers, custodians and other financial services firms can brand the advisor experience, while allowing their advisors to maintain strict confidentiality around the individual results. The firms will have access to a robust management dashboard as a way to monitor adoption rates, access detailed reporting across all clients and see firm-level trending and benchmarking on key indices, including satisfaction, refrerrability, risk and untapped revenue opportunities.

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“This feedback tool is unique in that it offers real value for advisors but also delivers more and better data corporately to support strategic decision making or help evaluate training and other support requirements for advisors” says Marie Swift, CEO and President of Impact Communications, a marketing consulting firm that has worked with thousands of advisors over the years. “Because the program allows advisors to see results across all clients, to highlight differences among top clients and then to drive the results down to the individual client level, it’s not something they can easily replicate themselves.”

Real action and opportunity is driven by client-level reporting and tools. Using the Client Audit, advisors can:

- Identify specific clients who are willing to provide referrals
- Identify cross-selling and marketing opportunities on a client-by-client basis
- Gauge satisfaction among existing clients and identify service gaps
- Understand what clients need, want and expect in the relationship Demonstrate leadership and commitment with existing clients
- Track progress and change over time

From an enterprise perspective, the program offers corporate management several important features:

- The Management Dashboard provides the ability to check on adoption rates and see detailed reporting and analysis at the firm level.
- The Advisor Dashboard gives advisors access to a fully personalized and completely confidential dashboard to check on program status, access reports, run personalized meeting plans or use a range of templates and resources.
- Customization is offered to allow advisors to generate a survey that meets their objectives, drawing on a large and tested bank of industry-specific questions and offered either on-line or in hard-copy formats.
- Compliance approvals are streamlined to eliminate the need for individually approved surveys or other client communications.
- Oversight functionality is offered, where necessary, to provide management with appropriate reporting on client satisfaction.
- Branding, white-labeling and customization of the advisor experience is provided so that each firm can offer a unique set of tools and support to their advisors and integrate with other available corporate resources.
- Program Support and Education ensure that advisors have ready access to a client feedback consultant to discuss any aspect of their program.

For more information, visit [www.AdvisorImpact.com](http://www.AdvisorImpact.com).

### **About Advisor Impact, Inc. and Julie Littlechild**

Advisor Impact helps financial advisors, accountants and financial services firms maximize profitability and productivity in their businesses. The company provides research, training and tools to help firms and individual advisors evaluate and improve client profitability – all in the context of delivering an outstanding client experience. President Julie Littlechild authored the Business Success Kit, a comprehensive guidebook to assist financial advisors in efficient practice management.