

The Loyalty Loop - A Model for Recurring Business

Over the past few weeks Adriaan Giessing, Seed Investments' Head of Distribution, has walked you through the various aspects of our service offering - including Practise Management, Financial Needs Analysis, Portfolio Optimisation and Short List Management.

Seed is built on a firm foundation of teamwork, and as such, we pride ourselves on sound partnerships in order to ensure that you have access to all the tools that you, as a Financial Advisor, need in order to deliver and meet your client expectations.

And so, in Partnership with Seed Analytics, we would like to introduce you to the Seed Analytics Consolidated Reporting Tool – the final tool in the ultimate Advisory toolkit.

Derek Gardiner, Seed Analytics' CEO, will walk us through this incredible model.



THE LOYALTY LOOP

How clients make purchasing decisions

Advisors often ignore recurring business. While perhaps not the best source of finding new high net worth clients, recurring business is usually the cheapest way to source healthy, incremental increases to their overall book. The cost of sourcing and landing the client is eliminated. Trust, once created, serves as a sturdy foundation for loyalty and future business in a cycle called the "Loyalty Loop".

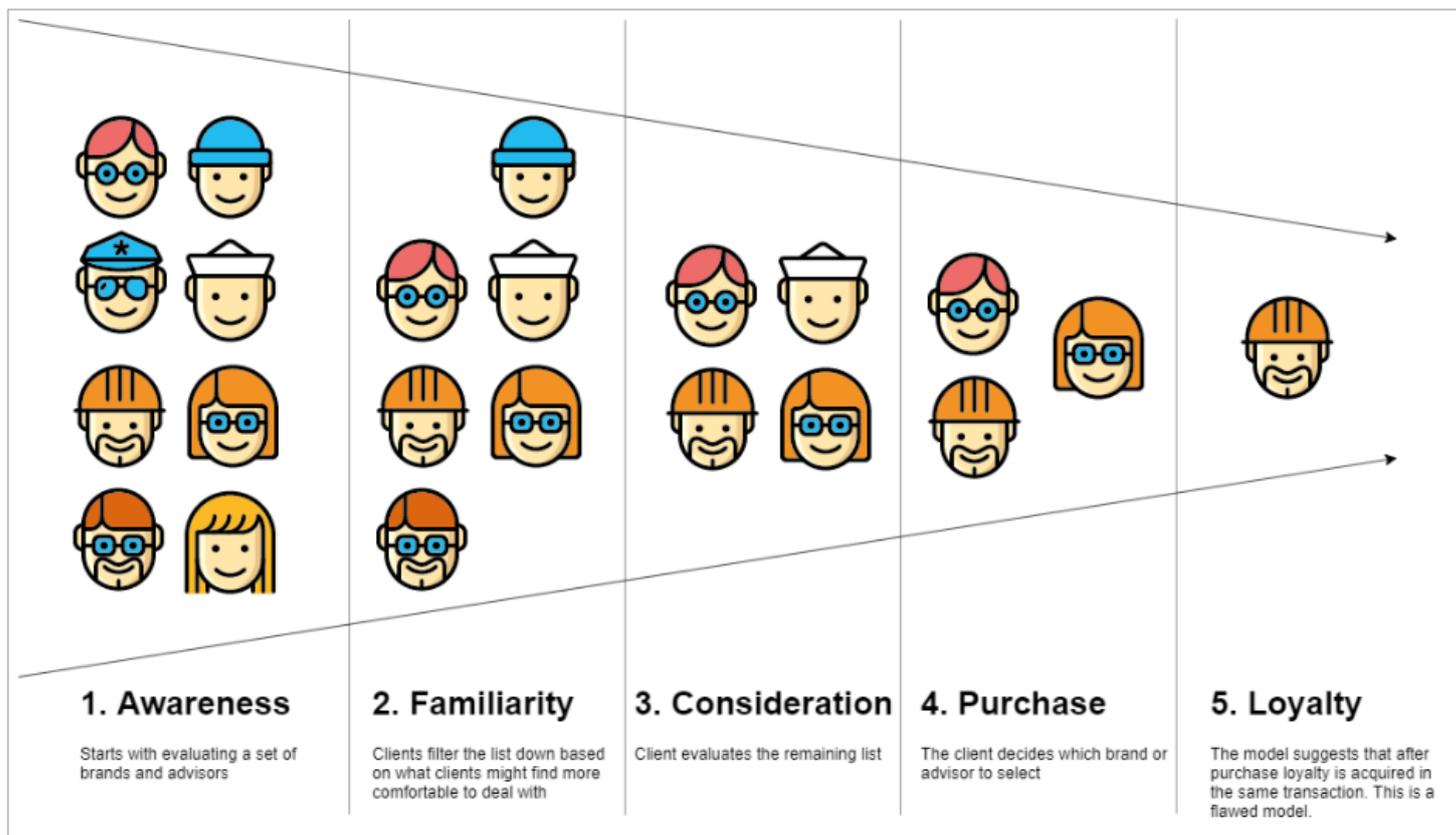
The Funnel is Flawed

The traditional evaluation funnel is a framework for approaching new business. It outlines the steps clients take when selecting an advisor. The approach suggests that clients assemble several possible potential advisors before filtering down to the single advisor that they select as their advisor. Finally, the framework (somewhat naively) indicates that customers automatically remain loyal once an advisor has been selected.

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However, this model is flawed, as it fails to take into account the ongoing experience after a client selects an advisor. It also ignores the potential client's ability to get service quality information from the advisors existing clients.

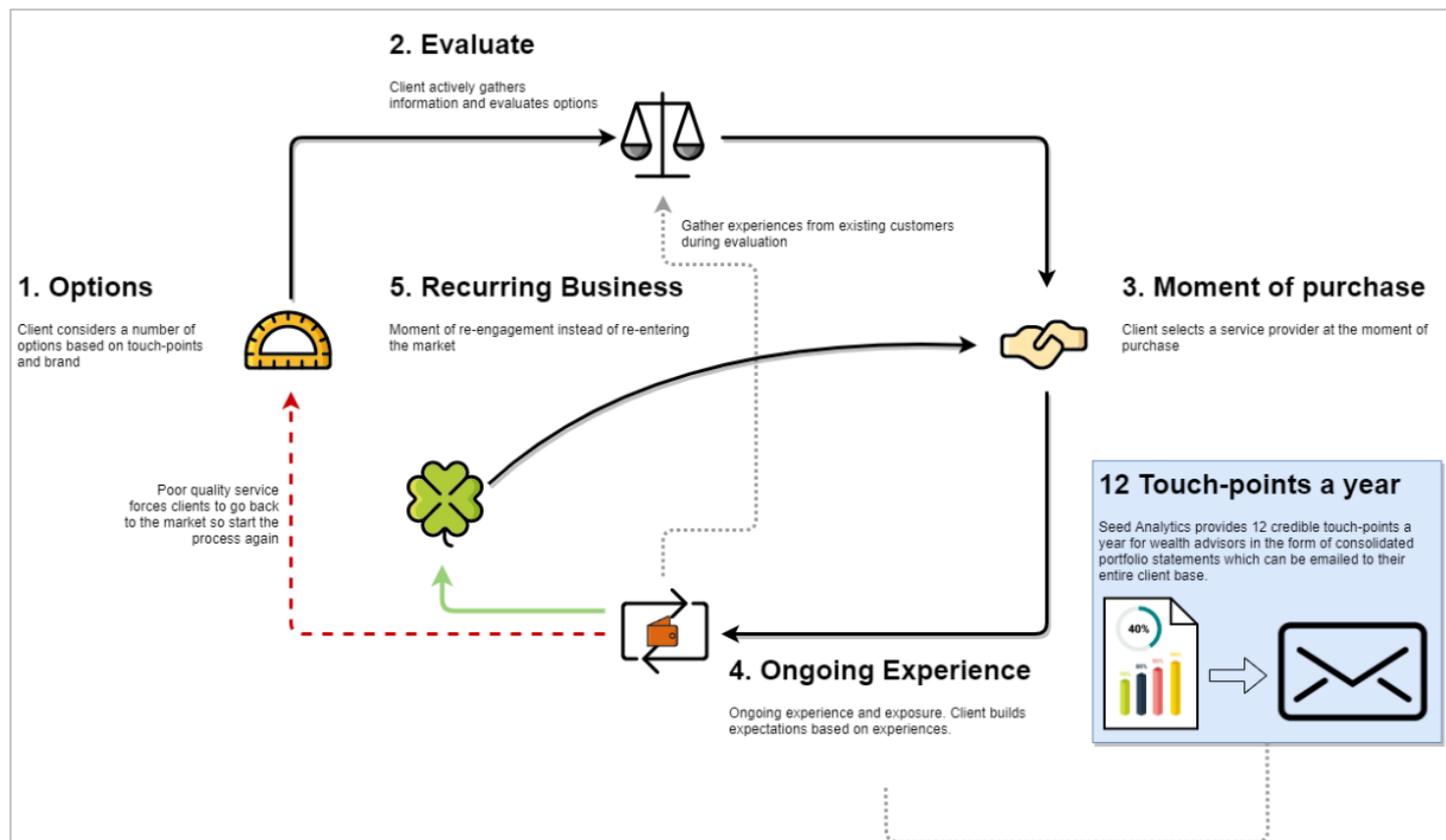
Loyalty

The loyalty loop is a framework that describes the recurring business model. It suggests that clients go through a constant evaluation cycle. If advisors are absent and the experience miserable, clients will typically seek out new options. In contrast, clients return for new business when the experience is pleasant. The trick is to keep a high level of engagement while avoiding the time sink. So how can advisors maintain a positive experience over the course of a financial year?

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How to Build Loyalty

One cost-effective solution comes in the form of a consolidated portfolio statement. By sending a client a monthly portfolio statement containing the advisor's brand, the advisor can increase the touchpoints from a single annual review by an additional 12 points.

Seed Analytics offers Consolidated Client Reporting. Statements for every portfolio in the advisor's book are generated by Seed Analytics' systems at a fraction of the cost it would take an advisor to do it manually. Using the client reporting system, advisors can send their clients a monthly consolidated statement together with a monthly market summary. That way, clients feel updated about their investments in the context of the market. The email is sent from the advisor's email address, so if the client does need to reach out, they simply need to hit reply.

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Start Your Journey Today!

I would really like to encourage you to make use of this valuable reporting tool that the Seed Analytics team is placing at your disposal. Pop us an email on info@seedanalytics.info to boost your recurring business today, or visit our website on www.seedanalytics.info.

We look forward to engaging with you,



Derek Gardiner

CEO – Seed Analytics

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