

iCommunicate - Business Outcomes Survey 2016

Trusted Advisor

Client Engagement programs for Lawyers, Accountants
and Financial Advisers

AstuteAdvisor is a *Trusted Advisor* program for Financial Advisers using AstuteWeel Software
Results collated April 2016

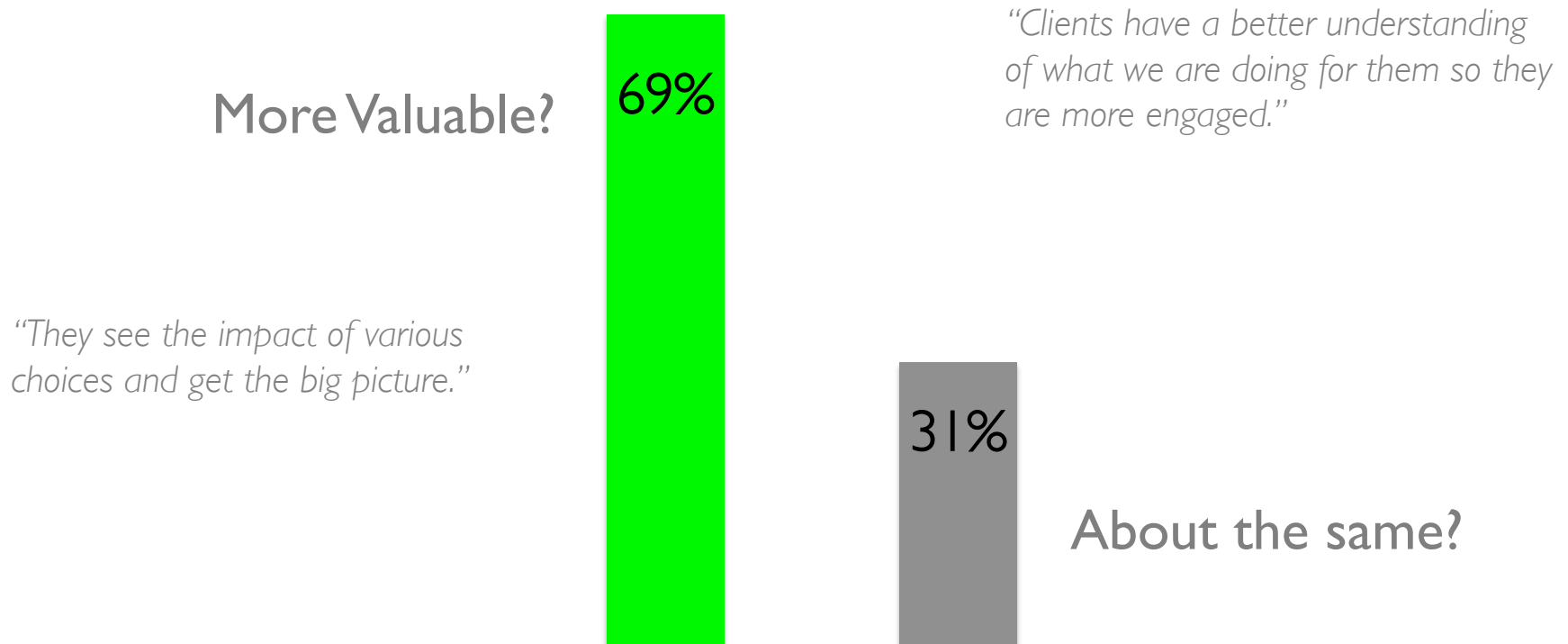
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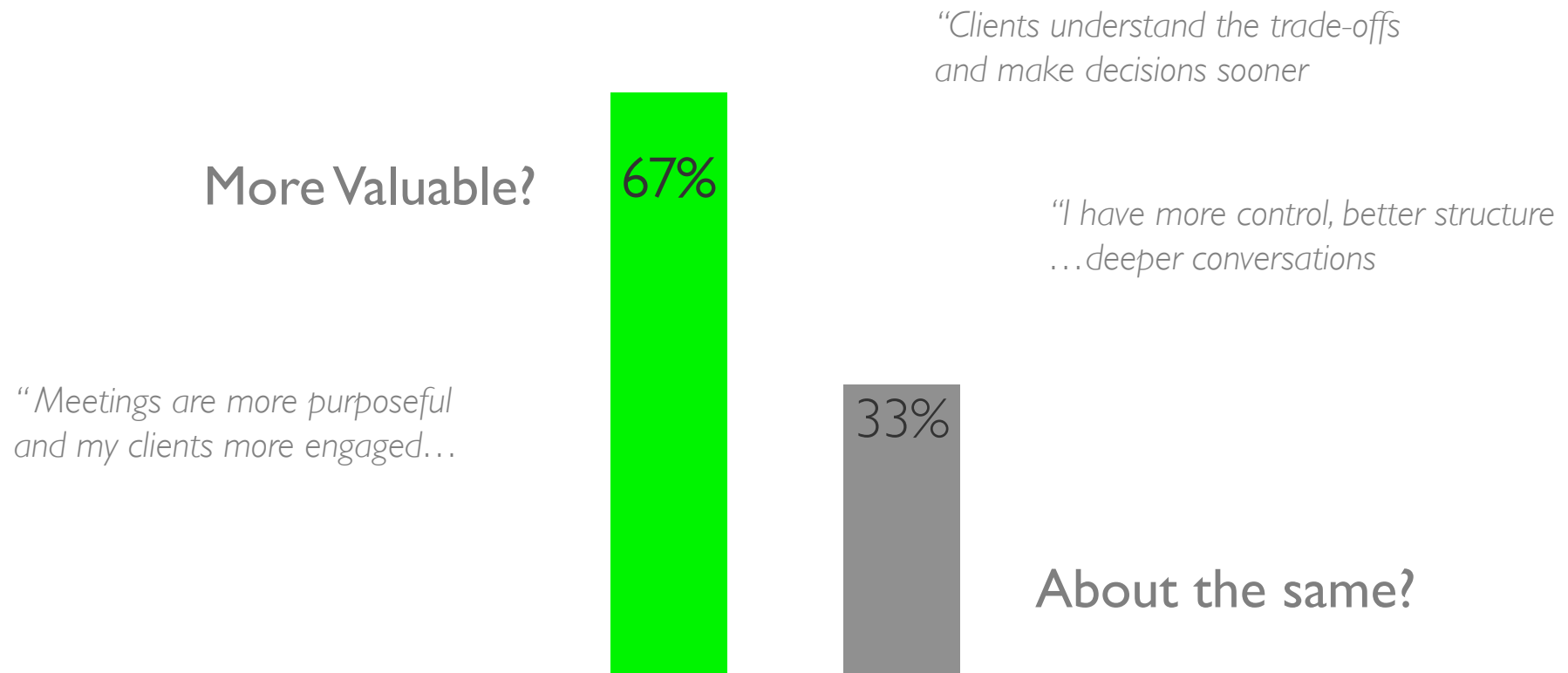
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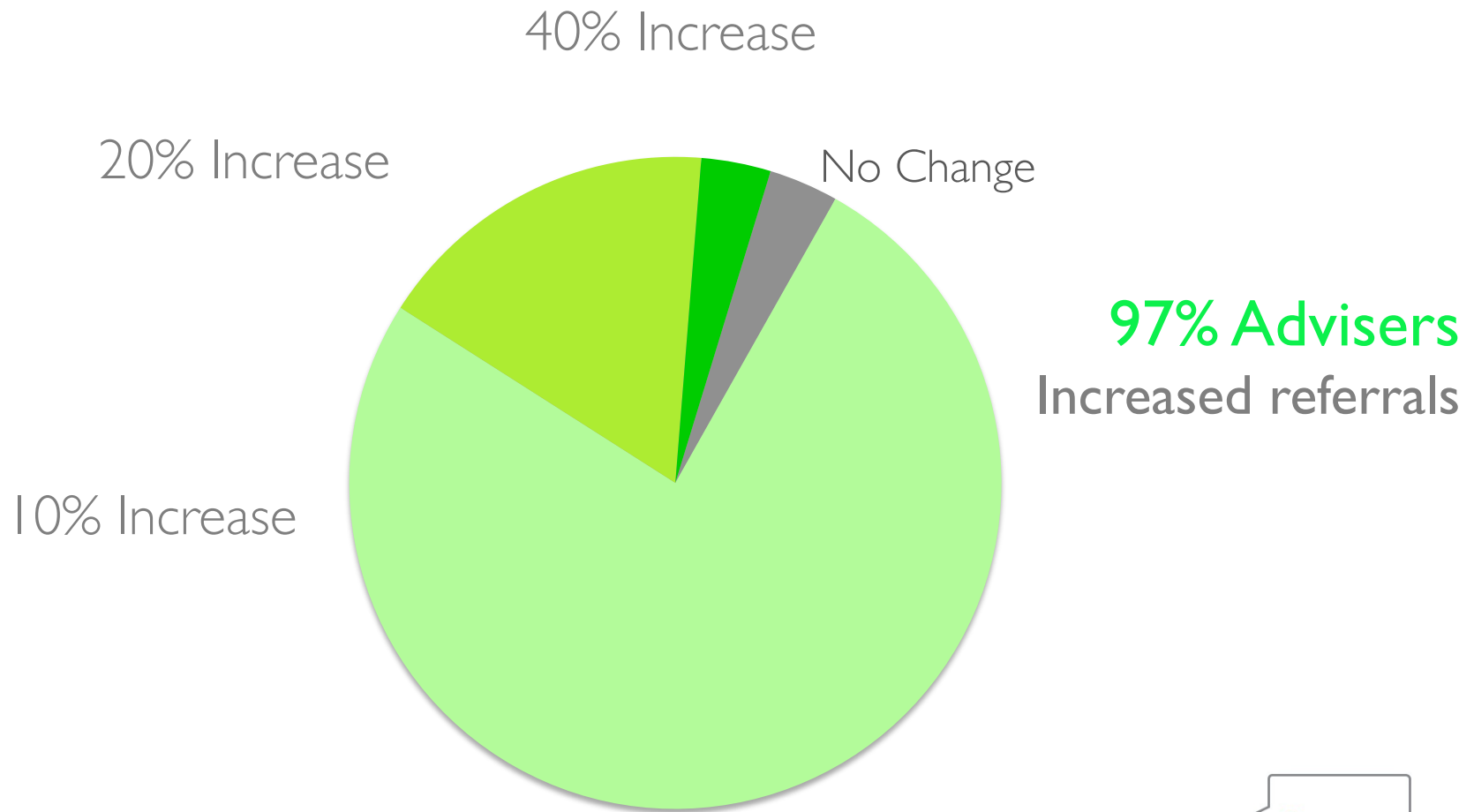
Question 1: Since the program, do your *clients* find your meetings:



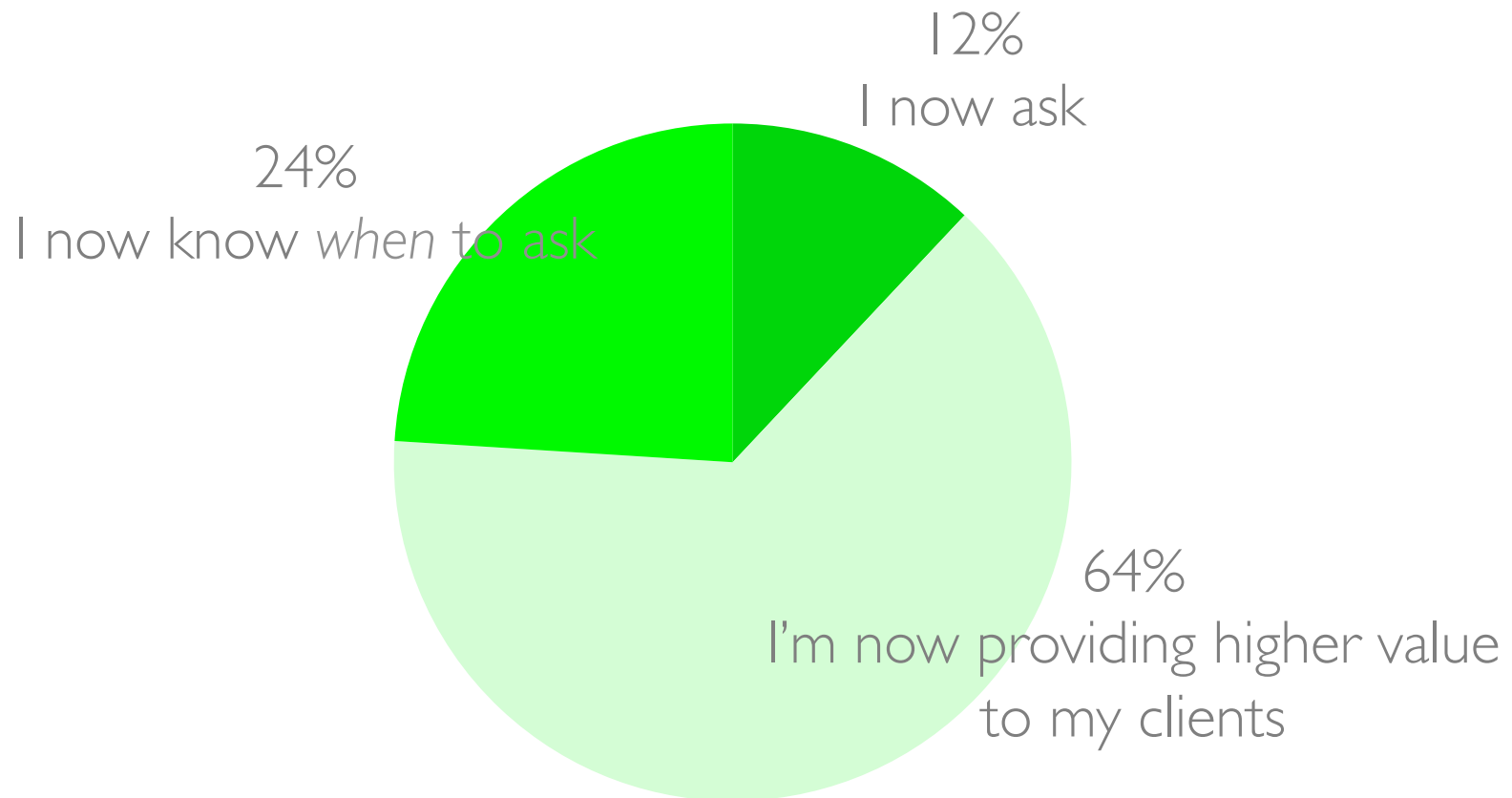
Question2: Since the program, do *you* find your client meetings:



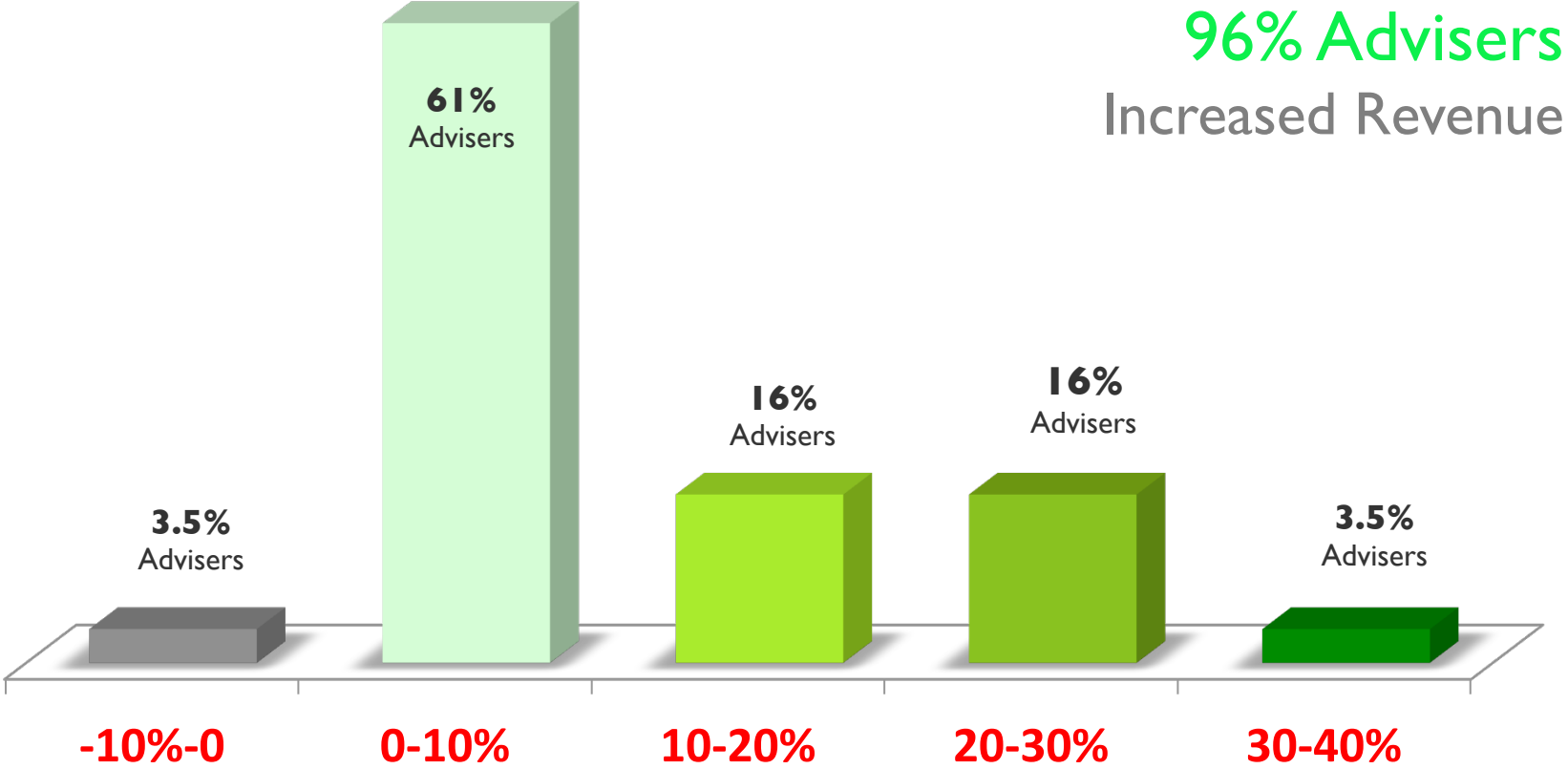
Question 3: Since the program, have your *referral rates* changed?



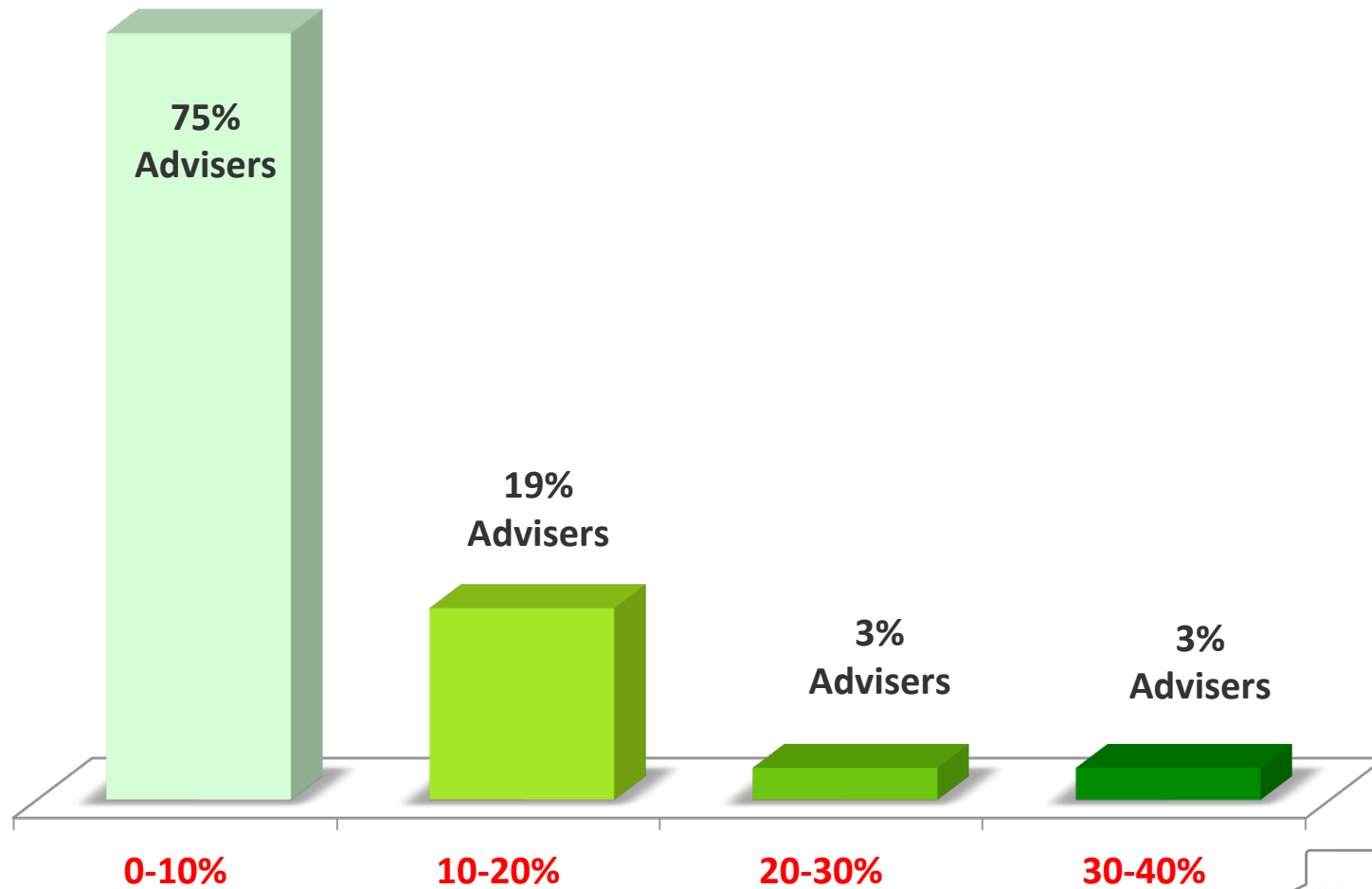
Question 4: To what do you *attribute the referral increase*?



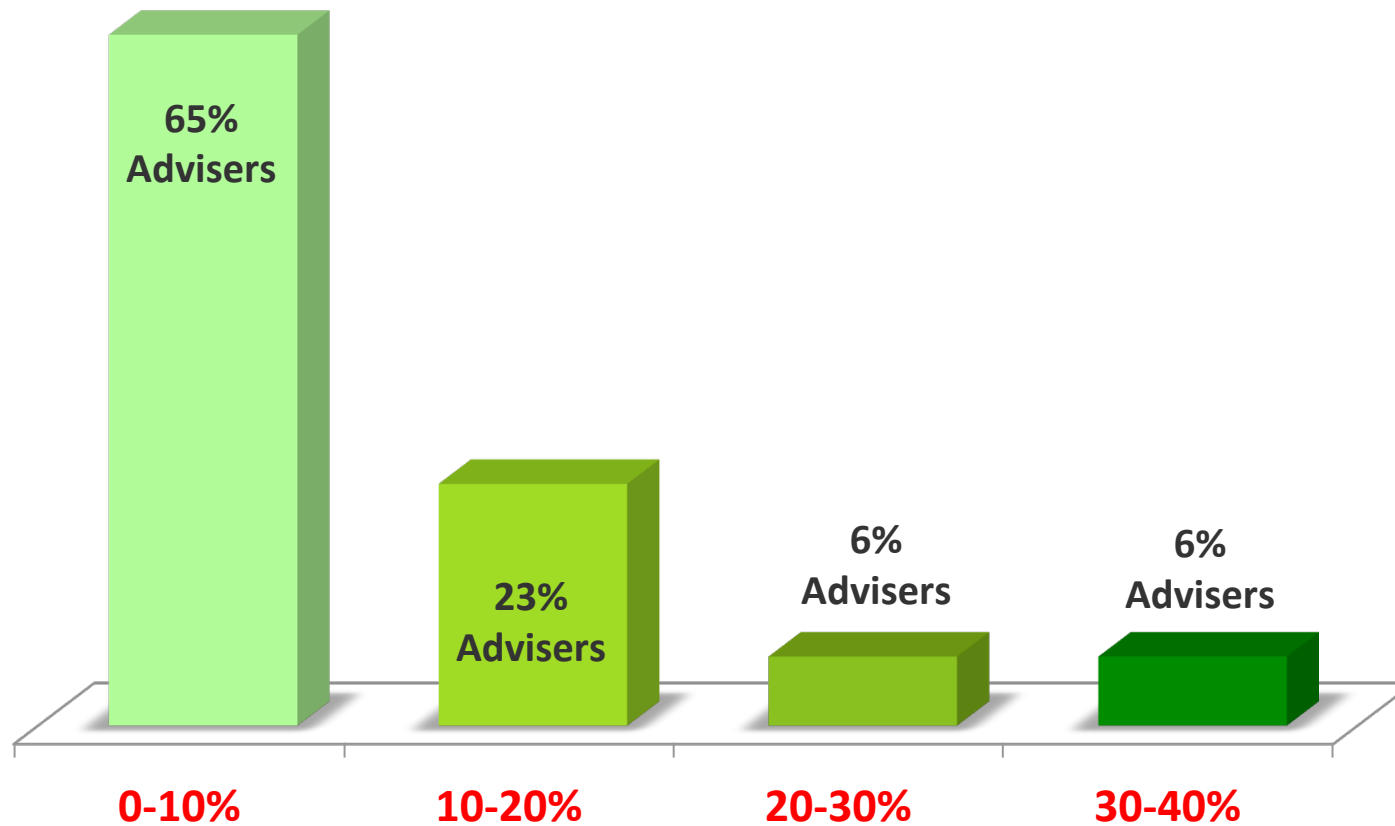
Question 5: Last Quarter, how much did your *total revenue* change?



Question 6: Last Quarter, how much did your *revenue per client* change?



Question 7: Last Quarter, how much did your *client meetings per month* change?

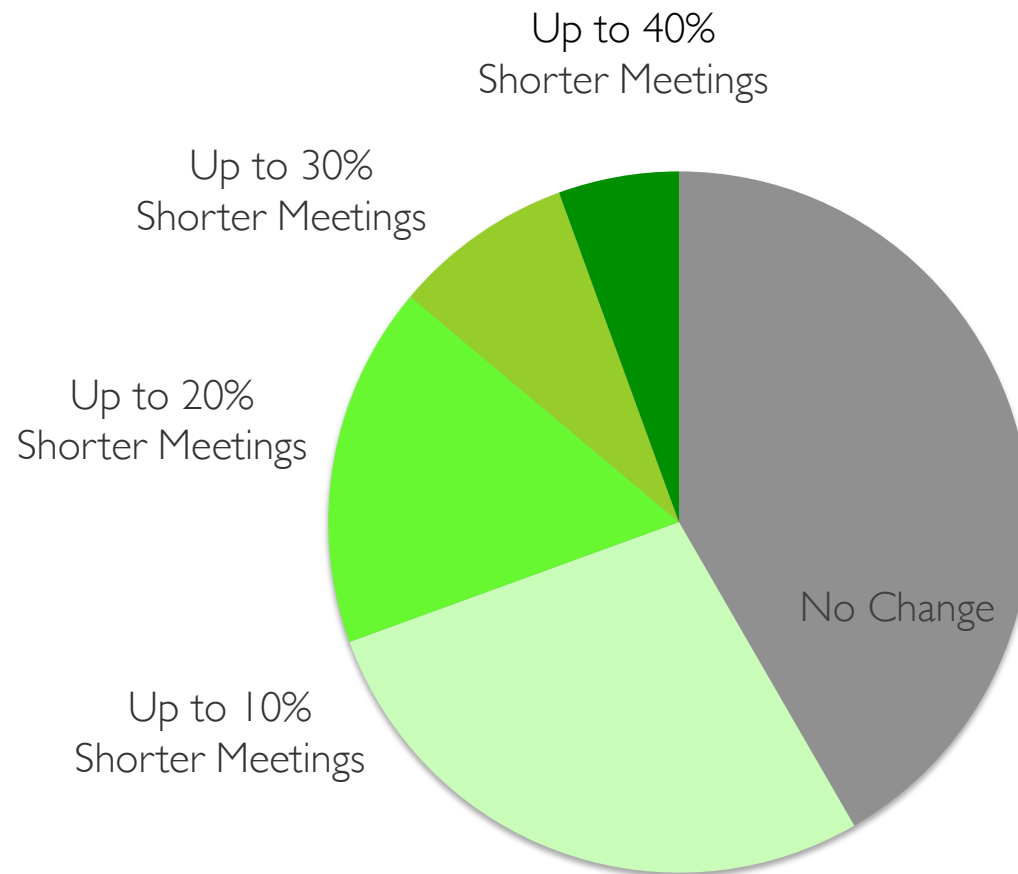


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Better advice. More clients.

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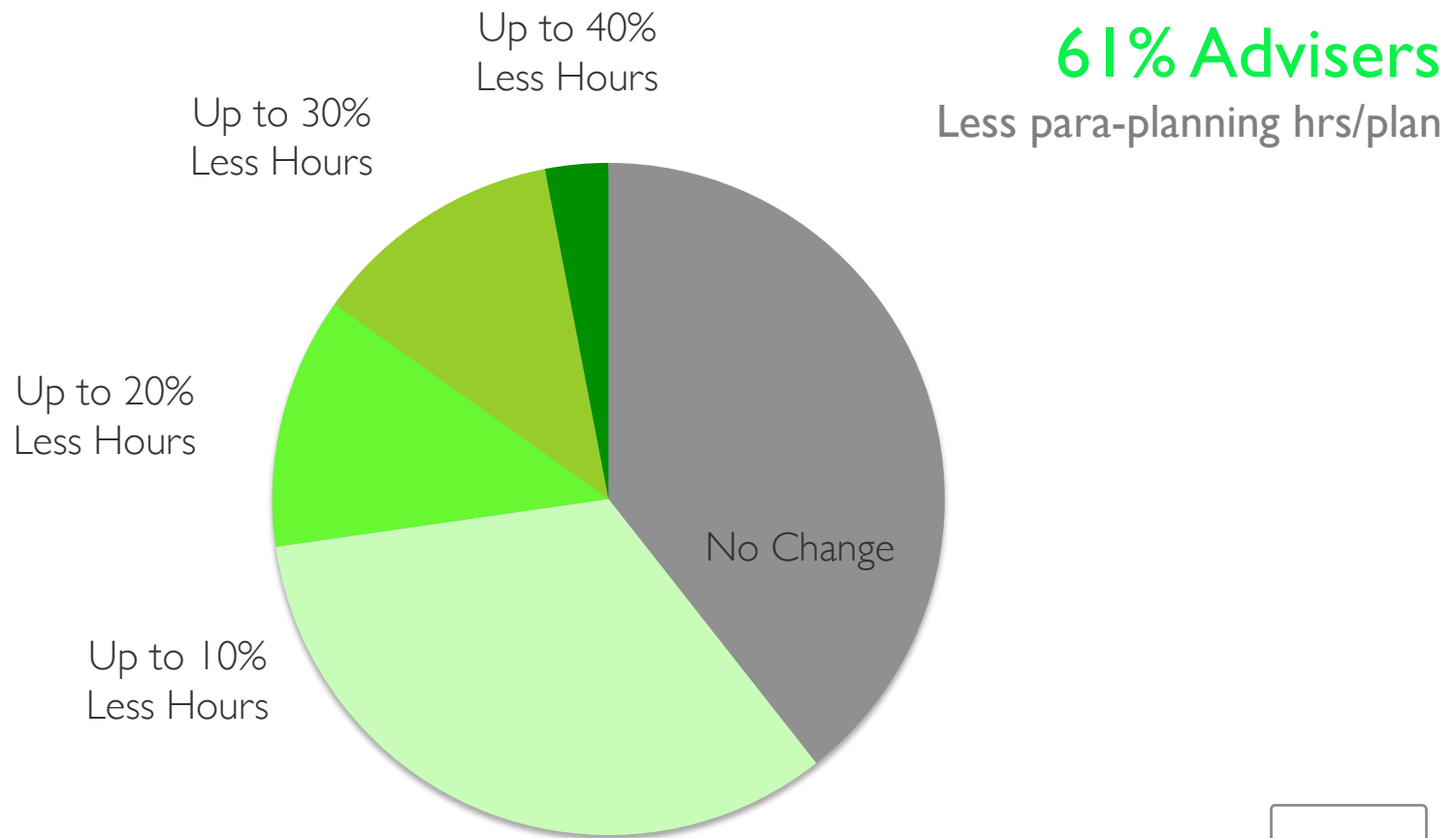


Question 8: Following the program, where are you experiencing greater productivity? – *Length of Client Meetings*



58% Advisers
More efficient meetings

Question 8: Following the program, where are you experiencing greater productivity? – *Para-planning hours/client*

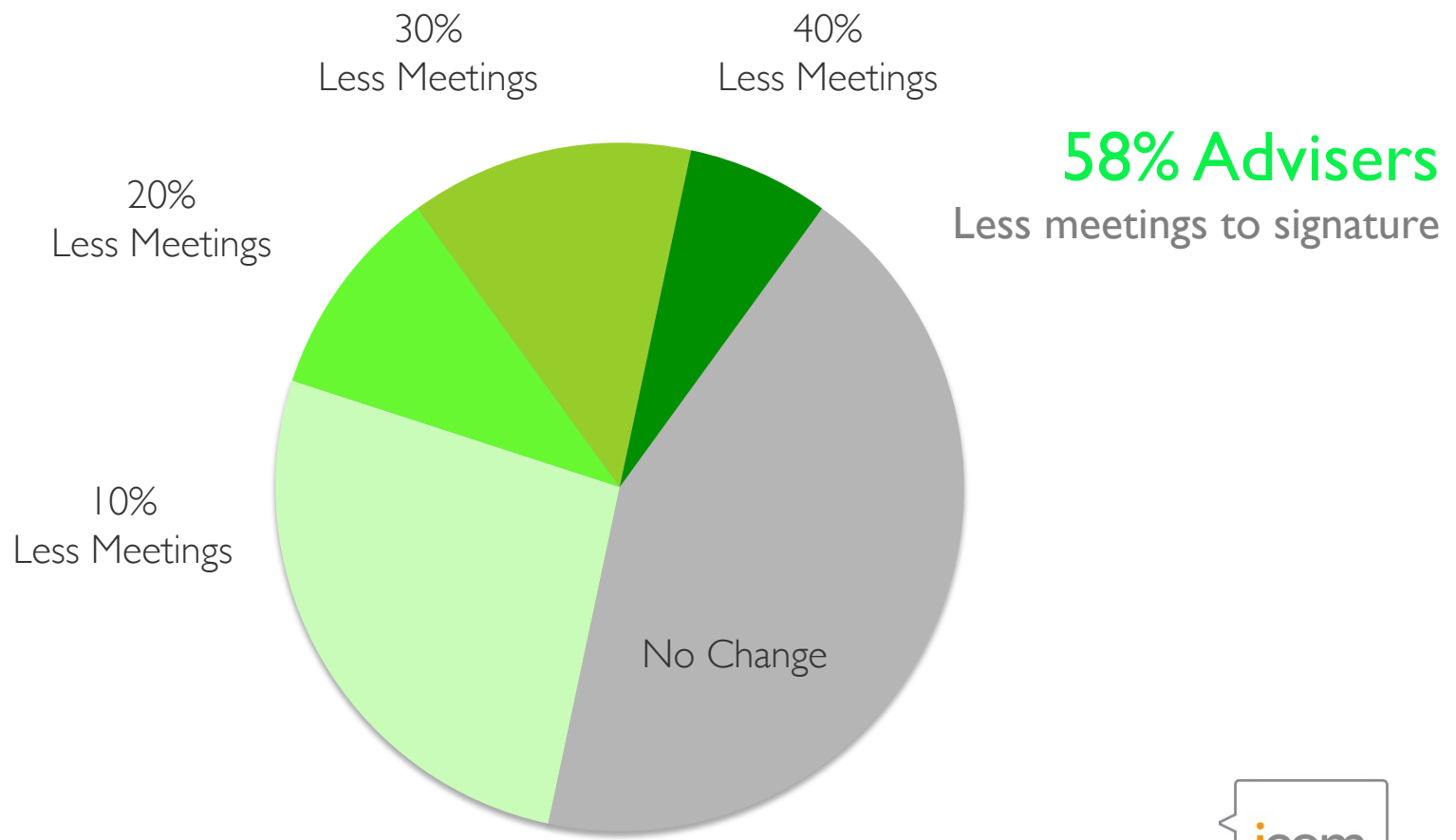


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Question 8: Following the program, where are you experiencing greater productivity? – *Number of Meetings to Signature*



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About This Survey – Collated April, 2016, www.icommunicate.com.au

Participants in this survey completed the AstuteAdvisor program, designed and facilitated by iCommunicate for clients of AstuteWheel software. The survey was conducted at least 1 full quarter after each program. The survey was voluntary and 63% of advisers reported their results. No qualification of results has been conducted.



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