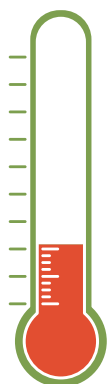




Research Reveals Dissatisfied Clients and to How to Win Them Back

Challenge: Investor Temperature Check



A leading global real asset manager recruited a new client team leader after fielding a series of investor complaints. After the leader implemented a new client relationship approach, management wanted to gauge investors' satisfaction with the firm.

Chestnut designed a custom research study to determine how the firm's investors really felt about the manager. **We focused on determining how well clients and consultants understood the manager's investment process**, since we know that is the most important element of any decision to retain an asset manager.*

Approach: Educate Investors on the Firm's Process



We obtained candid feedback from our phone interviews. The good news was that client satisfaction had indeed improved under the new client service team. The bad news was that several investors had been close to firing the manager until recently, and most didn't have a strong understanding of the firm's investment process.

Chestnut recommended our client implement a series of efforts to educate clients and the consultant community about their investment process. We helped create a message that the new client team began using in every document and conversation with investors.

Impact: Increased Client Reinvestment



During the following year client re-ups in our client's new deals improved by over 30%, driving AUM to a record high. Consultants and clients also began referring potential new investors to the firm for the first time ever.