

CLIENT EXPERIENCE (CX) READINESS EVALUATION

Please rate the firm's present state of CX Readiness for each of the following topics.

TOPIC	PRESENT STATE
Do you have a current strategic plan that guides the firm's CX direction?	Yes No Needs updating
Is the client experience a strategic imperative for your firm?	Yes No It should be, but not ready now
Our firm holds the belief that the client experience can substantially differentiate us.	Yes No Have not considered
Has your firm deployed any client experience specific programs in the last 18 months?	Yes No In-process
If so, what areas of the client service lifecycle does it pertain to?	Acquisition On-boarding Workflow Performance management Relationship management

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Our firm knows who the ideal client is and the attributes that make them 'ideal.'	Yes No Not organizationally wide
Our firm's value proposition is rooted deeply in the client experience.	Yes No Not sure
It's clear that CX is a part of our firm's brand promise.	Yes No Not sure
What type of client feedback do you currently capture?	Electronic surveys In-person interviews None formally established Other _____
How do you utilize the current client feedback you receive?	Review with client teams Discuss at leadership meetings Provide formal feedback loop with client None currently utilized