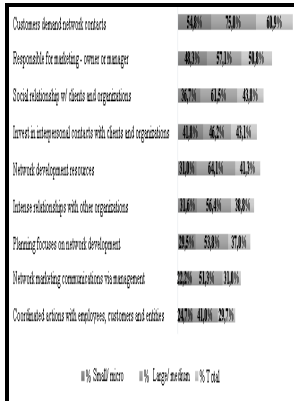


Synthesis of clients criteria for the assessment of professional firms and the service offering.

University of Salford - Client Categorisation



Description: -

-synthesis of clients criteria for the assessment of professional firms and the service offering.

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To keep ahead of proposed legislation, rule enactments, enforcements, and litigation across various jurisdictions, global organizations offering investment products across multiple structures and distribution approaches may need the broadest sensing and influencing scope. And firms that specialize in a particular expertise or expertise applied to a specialized area have a real advantage. The institution is consulted at various stages of the process — eliminating conflict of interest with the peers, planning the visit schedule, sharing the draft peer team report before the team leaves the campus etc.

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Client Categorisation

We work with you to understand your targets and goals and help guide you to a successful return on your investment — whether that is through increased production capacity, identification of bottlenecks, measuring efficiencies, guiding improvement through insights, or enhancing employee engagement. Here, the spotlight is not on the client as much as on the nature of the business challenge they are facing. You should recognize them, prioritize them and use that ranking in your product development, sales, marketing and customer service.

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