



1STRESOURCE
ESSENTIAL MARKET INTELLIGENCE

1st Resource Client Loyalty ProfileSM

The Client Loyalty ProfileSM is the foundational element to effectively defend and grow high-value client loyalty.

The 1st Resource Client Loyalty Profile is a proprietary method that delivers a deep and multi-faceted understanding of the quality of your relationship with individual high-value clients, as well as draw relevant themes that emerge across clients.

Through a proprietary personal interview approach that also provides quantitative measures, 1st Resource develops a Client Loyalty Profile for each client assessed, highlighting their key loyalty drivers, risk factors, motivators, priorities, and strength of relationship. This leads to a blueprint to develop strategies across the business to impact client relationships. Additionally, it establishes a current-state baseline for future loyalty assessments.

Key insight areas to the Client Loyalty Profile include:

- **Client Loyalty Type** – Client motivators and priorities which inform how you tailor relationship management and firm resources
- **Trust Levels** – Assesses degree of client confidence across all experiences and touchpoints
- **Relationship Dynamics** – Enhancers/detractors to quality of relationship and engagement; loyalty drivers, risks, and opportunities, including increased share-of-wallet
- **Advocacy** – Assessing likelihood to recommend/provide referrals proactively
- **Comparative Experience** – Satisfaction with previous providers compared to current experience with your firm's delivery
- **Overall Value** – Perceived value, including non-tangible relationship factors

Contact us for more information



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