



EDUCATIONAL SESSION IV

# CLIENT EXPERIENCE FROM GOOD TO GREAT

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THE SECRET SAUCE OF EXTRAORDINARY CLIENT EXPERIENCES



# Speakers



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01

**FAST, Painless  
Onboarding**

02

**Transparency  
& Trust**

03

**Personalized  
Insights**

04

**24/7 Support**

05

**Frictionless  
transactions**

- Customers remember experiences longer than transactions
- CX drives retention, loyalty and growth
- Differentiation increasingly comes from experience



## 5 Pillars of Great CX





- Seamless digital interactions
- Trusted financial partner
- Fast, secure and personalized service
- Consistent omni-channel experience

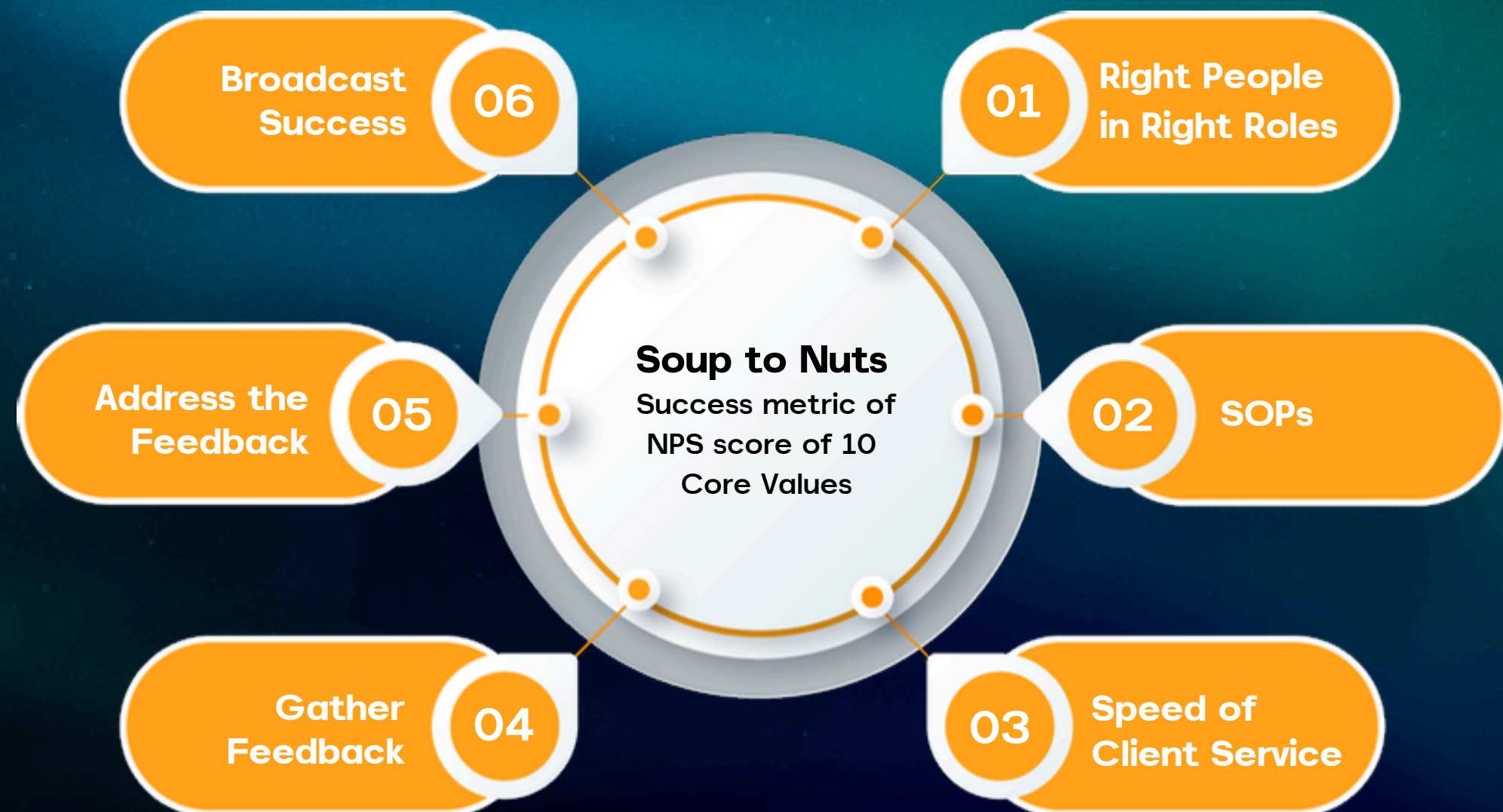


## Client Experience: Soup to Nuts

Comprehensive Experience across Axletree

### Building a CX Culture

- Empower employees
- Break down silos
- Reward customer focus
- Act on feedback





## Metrics that Matter



| Client Experience Outcome | Impact on LTV             |
|---------------------------|---------------------------|
| Higher satisfaction       | Longer client tenure      |
| Faster issue resolution   | Greater retention         |
| Personalized service      | Higher spending           |
| Stronger relationships    | More referrals & advocacy |



## Turning Pain into Loyalty



Listen fast



Own the  
issue



Communicate  
clearly



Learn and  
improve



# Trust: The Foundation of Exceptional Client Experience

Trust

Confidence

Loyalty

Partnership

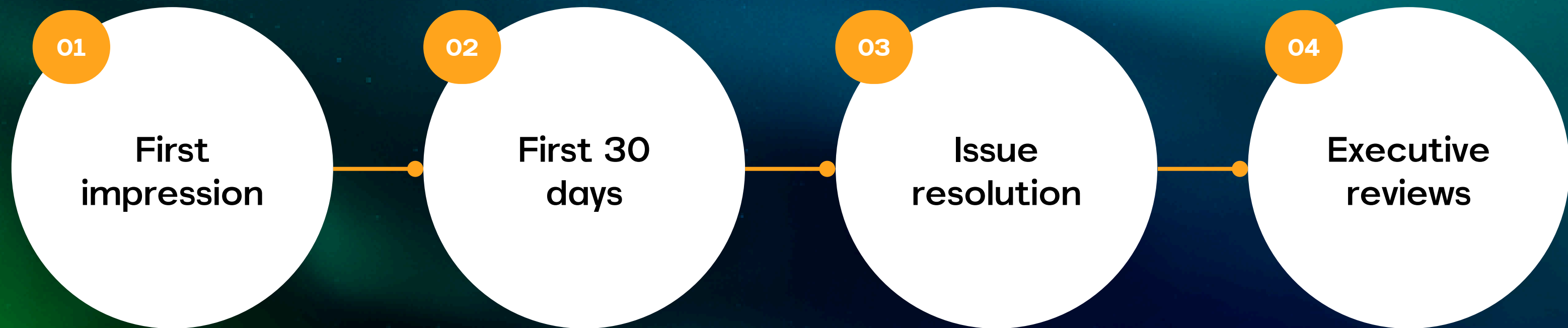
Advocacy

- Builds Loyalty: Clients stay and grow when trust is established
- Creates Confidence: Reduces uncertainty and supports decision-making
- Strengthens Communication: Encourages openness and collaboration
- Improves Resilience: Strengthens relationships during challenges
- Drives Advocacy: Turns satisfied clients into promoters

- Deliver on commitments consistently
- Communicate transparently
- Demonstrate expertise and reliability
- Listen and act on feedback
- Put client success first



## Moments That Matter





# Call to Action

01

Every  
interaction  
shapes  
perception

02

Design  
intentional  
experiences

03

Move from  
good to  
GREAT



# Q&A