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The 5-Star Client Experience: What Makes Clients Loyal Clients?

A Research Survey Available Through Janus Labs®

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Developing strong relationships with clients is not just about investment choices and fund performance. Increasingly, it's about understanding critical interpersonal elements that need to be addressed alongside portfolio-building strategies.

As part of its advisor-focused educational curriculum, Janus Labs partnered with private wealth industry expert Russ Alan Prince to quantify loyalty among wealthy investors. More than 900 affluent investors were surveyed to better understand their actions and intentions toward their primary advisors. The answers revealed surprising information about affluent investors' expectations, preferred client service experience, and the primary drivers of their loyalty.

How do wealthy clients define loyalty? Survey respondents defined loyalty using distinct client actions:

- Give more assets: 8.7% more
- Provide referrals: 4x more
- Take away fewer assets
- Receive non-traditional services

Based on the survey responses, Janus Labs developed a detailed model of the 5-Star Client Experience, designed to help advisors strengthen and expand their relationships with affluent clients. Through the program, advisors can learn more about the five elements that define a stellar client experience and how mastering them can help build a loyal client base. The five critical areas include:

- *Investment Approach*: The strategy you use to help clients achieve their financial goals.
- *Investment Responsiveness*: Your plan for communicating with your clients about market or economic developments that could impact their portfolio performance.
- *Rapport*: The quality of the relationship between you and your clients.
- *Professionalism*: The degree to which you are perceived as being skilled and qualified.
- *Added Value*: Going beyond the investment advisor persona.



To learn more about creating a 5-Star Client Experience, access the [5-Star Executive Summary at Janus Labs](#).

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