

# Engaging with the modern financial decision maker

## *Increased responsibilities*

Is the nature of financial management roles within large corporates changing?

The role of CFO's and financial managers in large companies is changing with more and varied responsibilities added to the role as well as the increase in millennial staff fulfilling these roles.

This change has shifted the nature of interactions between financial companies and their clients and warranted further exploration.

## *Understanding requirements*

To better serve them, we needed to understand how the attitudes and needs of financial decision makers in these organisations were changing and the impact of these changes on current financial provider interactions and the future relationship

Quantitative research focused on financial decision makers in the UK, USA and China – followed by a qualitative phase in the UK to explore findings in more depth

## *Adapting the process*

The research allowed the client to critically evaluate their current client communication and support setup to ensure that they were interacting with their clients on the terms that they – the clients - wanted and providing relevant information to them at key 'moments of truth'.

## *Looking to the future*

The outputs of this process helped to inform how these financial decision makers prefer their interactions with financial providers - the 'how' (method), the 'when' (stage and frequency), and the 'what' (content)

This enabled the client to redefine their offer, and the customer experience they deliver to ensure maximum mutual value from the relationship – beneficial for both the organisation and its customers.

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