

Danielson: Mapping Wealth Management Drives Client Satisfaction And Retention



挑战

发现Mindjet之前，Danielson金融集团员工在Microsoft PowerPoint中创建客户投资报告，注册助理Carrie Wynn和Lindsay Wright，代表性地安排了20-25个幻灯片演示，在客户当前财务状况的环境里将重点目标中的一切事务并入到特定的投资选项。

然而综合information-wise、线性PowerPoint界面既创建起来耗时在会议中导航又具有挑战性，Wynn注意到，“我们还想讨论[整体]目标和机会，试图在PowerPoint里呈现一切导致太多幻灯片和太多信息，需客户轻松吸收。”一种更灵活、更响应的分析和报告系统绝对是必需的。



Based on Mindjet's technology, Danielson's investment reports now engage clients visually, presenting a map of all elements integral to achieving financial wealth and security. Primary categories of goals, investments, retirement planning, financial plans, resources, etc., expand to show detailed analysis and options, but the big picture is always present.

Through annotations, client feedback is incorporated seamlessly during meetings and updated to capture a complete history of an investment plan and its implementation. "Clients really respond to this personalized, visual approach," says Wynn. "They can see everything in context and in a single view, reminding them of what they want to discuss—resulting in a more interactive conversation."



Danielson Financial Group is a financial services firm offering comprehensive wealth management services to diverse clients, from successful entrepreneurs and professionals to retirees and others. Simplifying the complexities of wealth management into the Lifetime Solutions Process, Danielson helps their clients articulate and meet their investment goals.

CHALLENGE

Improve efficiency in investment strategy analysis and client report preparation.

Create a client investment report that captures a total snapshot of financial positions in an easily presented and comprehensible format.

SOLUTION

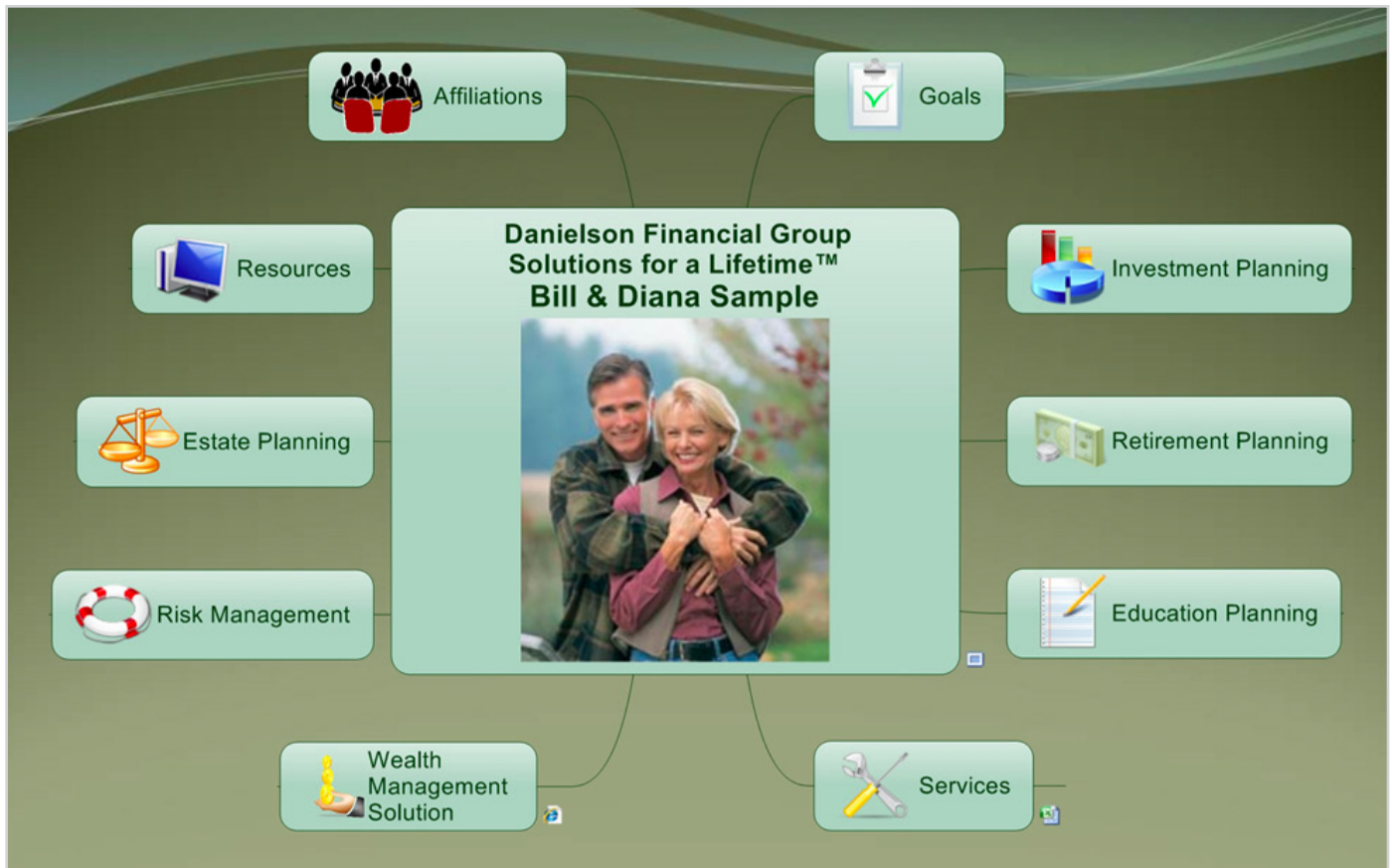
Employ Mindjet mapping technology to produce a robust template for client financial analysis.

Present a client's financial status report visually, clearly and in context, with notes and comments easily included

RESULT

Realized a superior client-centered report format, while achieving significant time- savings in report preparation.

Mindjet facilitated Danielson Financial Group's improvement in investment report format and creation, yielding greater understanding, engagement and retention of their wealth management clients.



Danielson Financial Group's template lets advisors present a complete overview of investments, while retaining access to all the details.

THE RESULTS

Danielson has realized significant efficiencies with their new presentation and reporting system based on Mindjet mapping, the Lifetime Solutions Process. Employees have saved on average four to six hours per week outlining new and in-progress client presentations. Innovative report formatting captures the multiple financial components and their interactions inherent to successful wealth management—in a clear and intuitive style—key to maintaining good client communications.

Mindjet's real benefit for Danielson has been client loyalty and retention. Clients can now see their investments' big picture during update meetings, with presentations incorporating essential details within the framework of Danielson's holistic approach to financial management. "[Mindjet has increased] client confidence," says Wright. "We know more about each client; and they know more about what we're doing to help them."

“Mindjet has helped us retain our clients by visually showing them that we have their best interests at heart, both in the present and in their future retirement.”

Linsay Wright, Registered Assistant

MINDJET | 1160 Battery Street, 4th Floor, San Francisco, CA 94111 USA
 Toll Free: +1 877.646.3538 | Phone: +1 415.229.4200 | Fax: +1 415.229.4201
 sales@mindjet.com | www.mindjet.com