# Case Study → Client Service Excellence in Wealth Management

*Developing client-facing capability at every stage of the service journey, in a leading private wealth management firm*

## Two Audiences

Analysts and Associates (AA) and Client Service Executives (CSE)

## 6 Modules

three for each programme, practical and scenario-based

## Renewed

into 2026, with face-to-face half-day sessions for AAs

## Scenario-led

client scenarios, exercises and role play throughout

THE CLIENT NEED

### The commercial challenge

A leading wealth manager wanted professionals at different stages of the client-service journey to communicate more effectively and deliver the client experience its brand promises. Analysts and Associates were moving into more client-facing roles, and Client Service Executives, though administrative, have regular client contact.

PROGRAMME ARCHITECTURE

| | | |
|---|---|---|
| AA 01 | **Listening & Questioning** | Better client conversations, built on the client's own scenarios. |
| AA 02 | **Client-Centric Presentations** | Audience, visuals and storytelling, in two parts with feedback. |
| AA 03 | **Communicating Value** | Differentiating the firm, justifying fees and avoiding commoditisation. |
| CSE 04 | **Communication Skills** | Clear, approachable, professional communication, spoken and written. |
| CSE 05 | **Empathetic Dialogue** | Adapting to client styles and handling difficult conversations with care. |
| CSE 06 | **Leveraging Your Brand** | First impressions, credibility and communicating the value of the service. |

CAPABILITY SHIFTS

**Communicating information** → clarity and impact
**Standard presentations** → client-centric storytelling
**Asking questions** → listening for client needs
**Professional service** → professionalism with empathy
**Responding to clients** → adapting to their style
**Providing a service** → communicating its value

WHY IT WORKED

1. Contextualised: client-supplied scenarios reflected the conversations participants really have.
2. Practice built in: role play, spotlight exercises, presenting and feedback.
3. Participants valued the interactivity and role play; both programmes continued into 2026.

THE TAKEAWAY

Both programmes were practical and set in the client's own environment. Together they developed professionals at each stage of the service journey, from listening and presenting to empathy and communicating the value of the service.