



incedo

The two week
hack to
**better growth,
conversion or
engagement**

Our **Digital Diagnostic** will help improve how you stand up to your rivals where it matters:



AUM Growth



Advisor Onboarding & Retention



New Client Acquisition



Client Satisfaction & NPS

Impacts of a Digital Diagnostic

- ✓ Makes advisors and investors more satisfied with their experience
- ✓ Can decrease your call volumes
- ✓ Leads to increased positive reviews about your site/app
- ✓ Helps a team bogged down by maintenance to think more strategically
- ✓ Gives a roadmap for technology scaling
- ✓ Helps grow traffic or volumes to your sites

We can provide results in just two weeks

We stand up a cross-functional team and give you an action plan for a specific flow around your advisor and investor experience.

- A prioritized action plan to move your KPIs
- A preliminary concept for you to get buy in to explain your future state
- UX Audit Findings
- Competitive analysis and benchmarking
- Technology and Infrastructure insights

We do all of this simply without using much of your time:

- We don't need to get onboarded to your systems
- Limited knowledge transfer
- No need to sign an overall service agreement

Data insights are useless if you can't compare them

Have you ever looked at an analytics dashboard and said to yourself, I get that's what's happening, but is that good? We utilize a proprietary dataset and industry reports to provide comparative benchmarking. This ensures that you can actually understand how your data compares to the rest of the wealth management sector.

Do competitors get a better conversion rate through their onboarding funnel?

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How does your client attrition stand up to the industry?

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Are my client engagement metrics bad or good?

What makes INCEDO different

Combining design thinking, data-informed decisions, iterative experimentation and innovative technology to provide our clients a full-stack solution.



Real World Impacts

KPIs

Core KPIs
We've worked with several major banks and firms to move the most important numbers.

30%

Of Advisor NPS Increased, Net New Assets grew by 20%
Improved an Investment Recommendation Engine.

10%

Of improved profitability and practice health
Insights and Next Best Action Engine - 20% Improvement in Revenue per advisors - 70 affiliated Practices.

30%

Reduction in cost per transaction
Operations transformation across trading, asset transfers and new account opening.

To make sure you know what to prioritize for your Advisor technology and efficiently innovate to meet the most trendsetting disruptors in the marketplace.

About Incedo

Please Email us at:
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Incedo is a digital transformation expert empowering companies to realize sustainable business impact from their digital investments. Our integrated services and platforms that connect strategy and execution, are built on the foundation of Design, AI, Data, and strong engineering capabilities blended with our deep domain expertise from digital natives. With over 3,000 professionals in the US, Canada, Latin America, and India and a large, diverse portfolio of long term, Fortune 500 and fast-growing clients worldwide, we work across financial services, telecom, product engineering, and life sciences industries. Visit our website to learn more about how we help clients transform today : www.incedo inc.com