

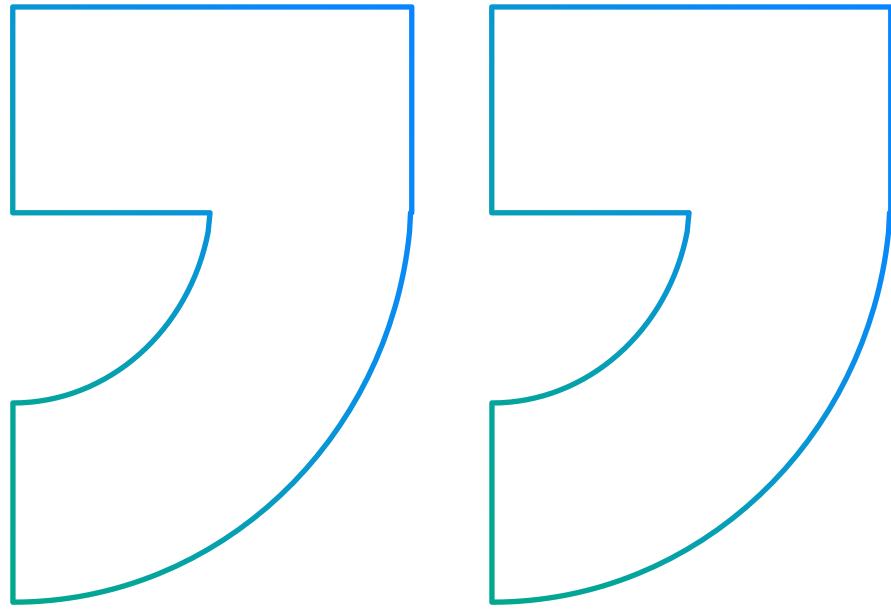
**COMARCH**

# **Customer-centricity in Wealth Management**

Lessons learned

**Grzegorz Prosowicz, PhD**

Consulting Director, Comarch



It's all about the journey,  
not a destination...

# Banking of today...



Private banking

First class

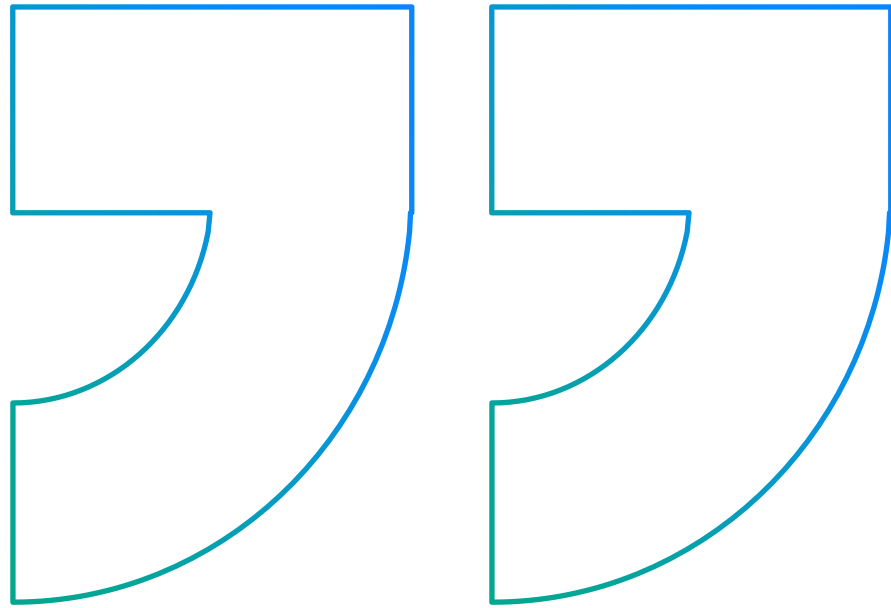
Priority banking

Business class

Retail banking

Economy class





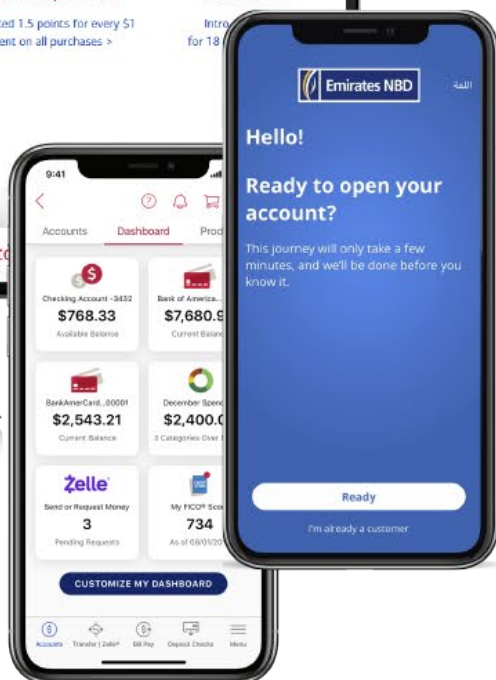
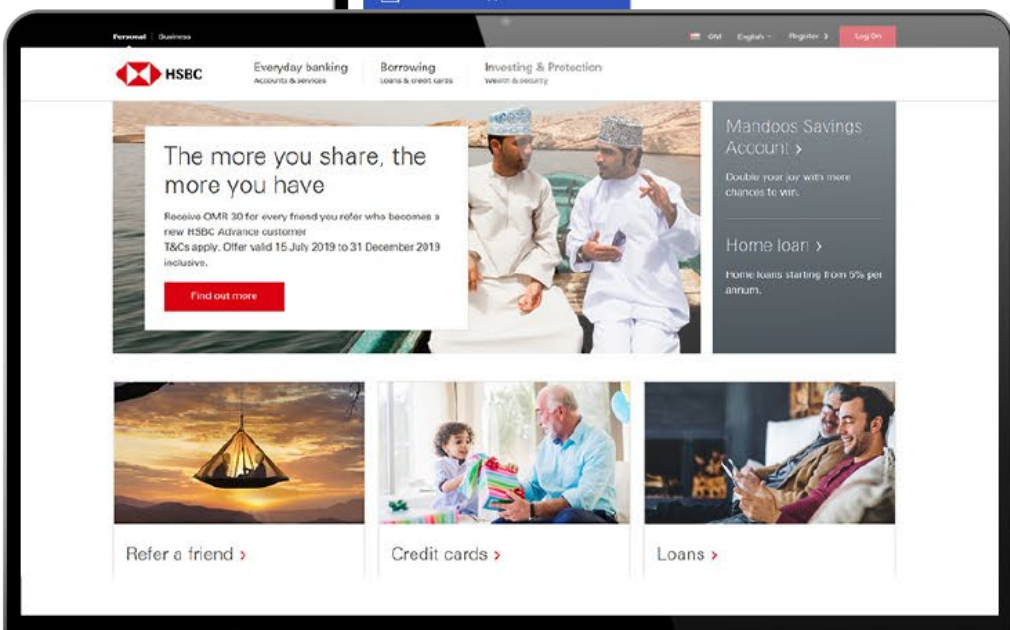
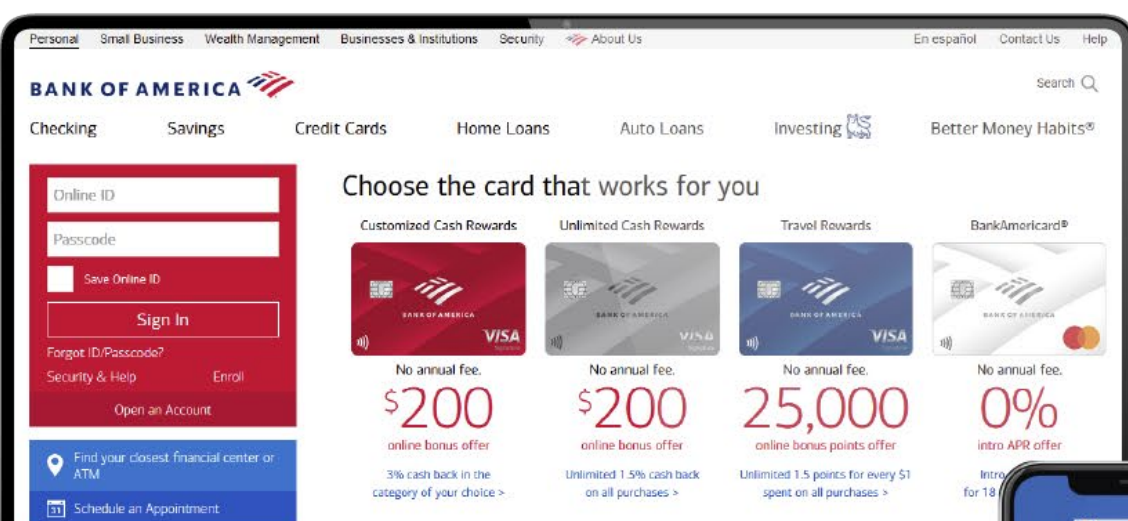
Even if you only purchase  
clothes twice a year, you  
wear them every day.

Marc Abraham, BCG

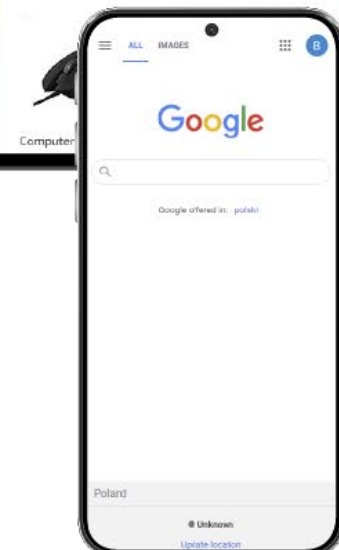
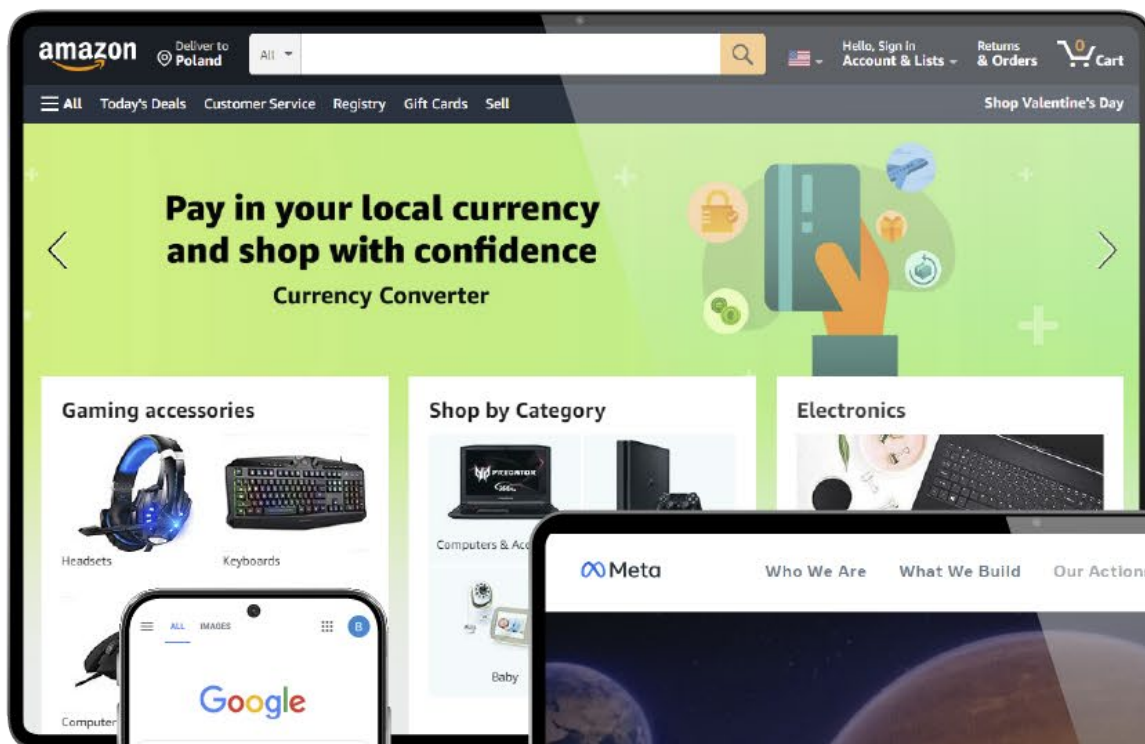


# Banking of tomorrow?

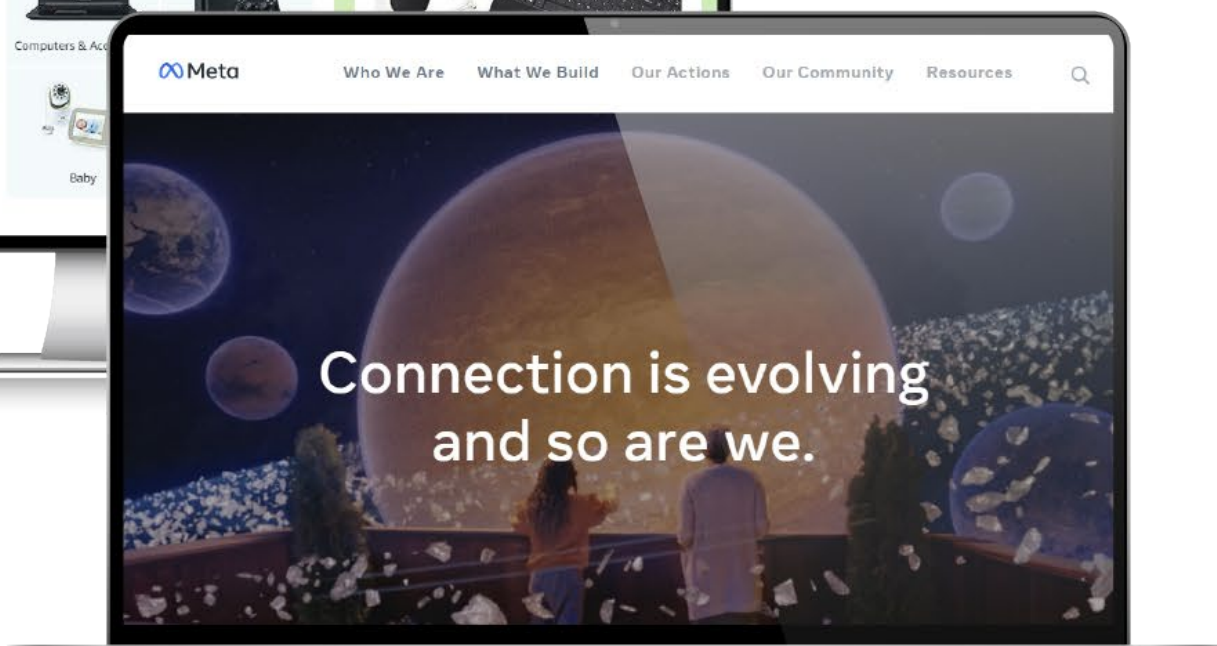
BANK OF AMERICA



amazon



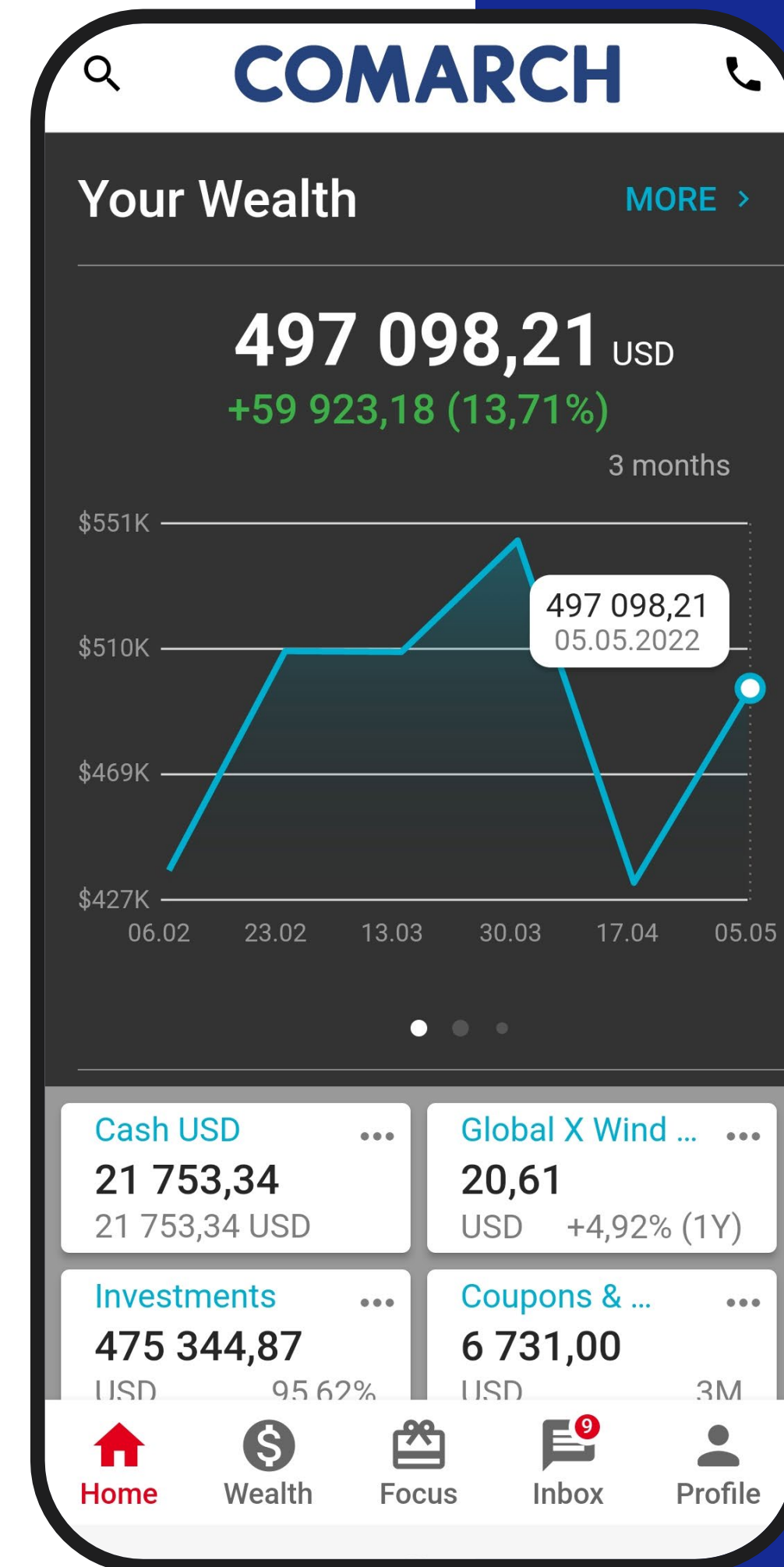
Meta



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# Demo

Customer-centric experience  
in wealth management





# What personalisation the customers expect?

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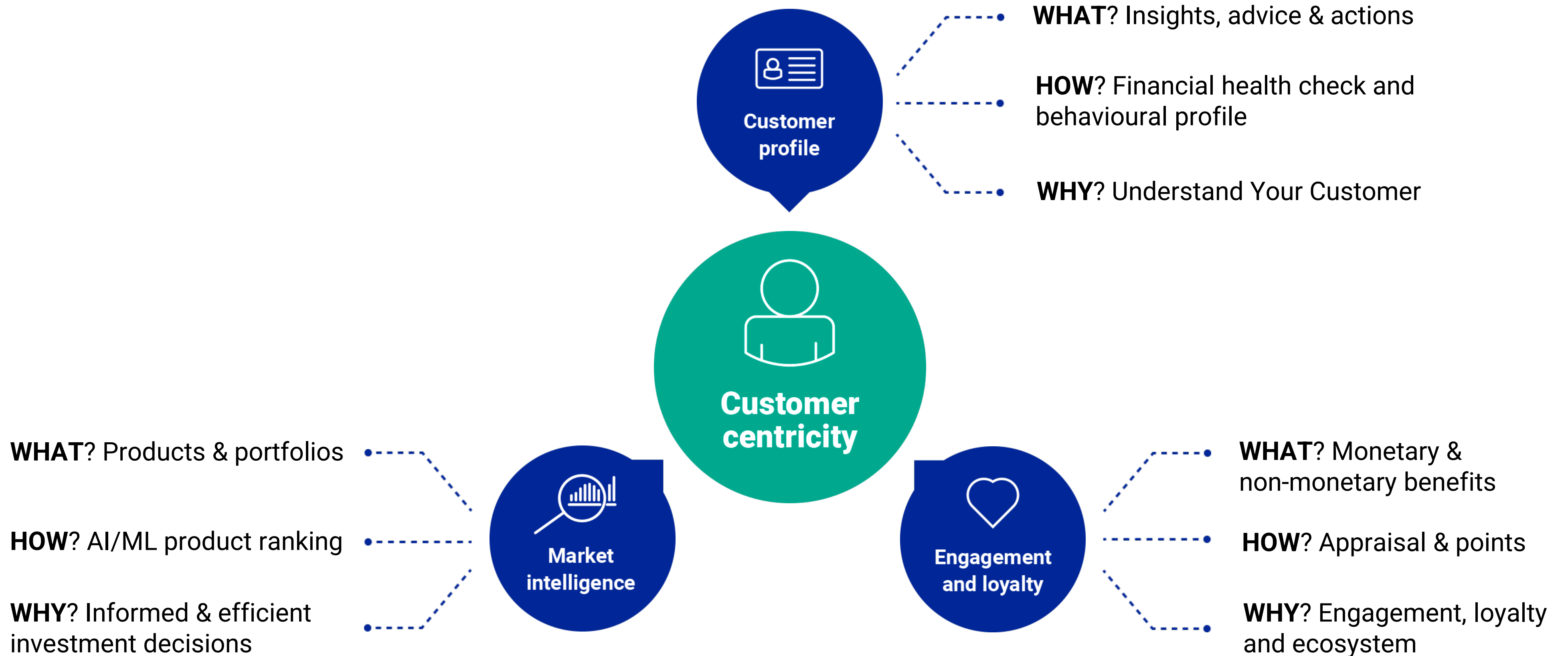
**Values**

**Expertise**

**Benefits**



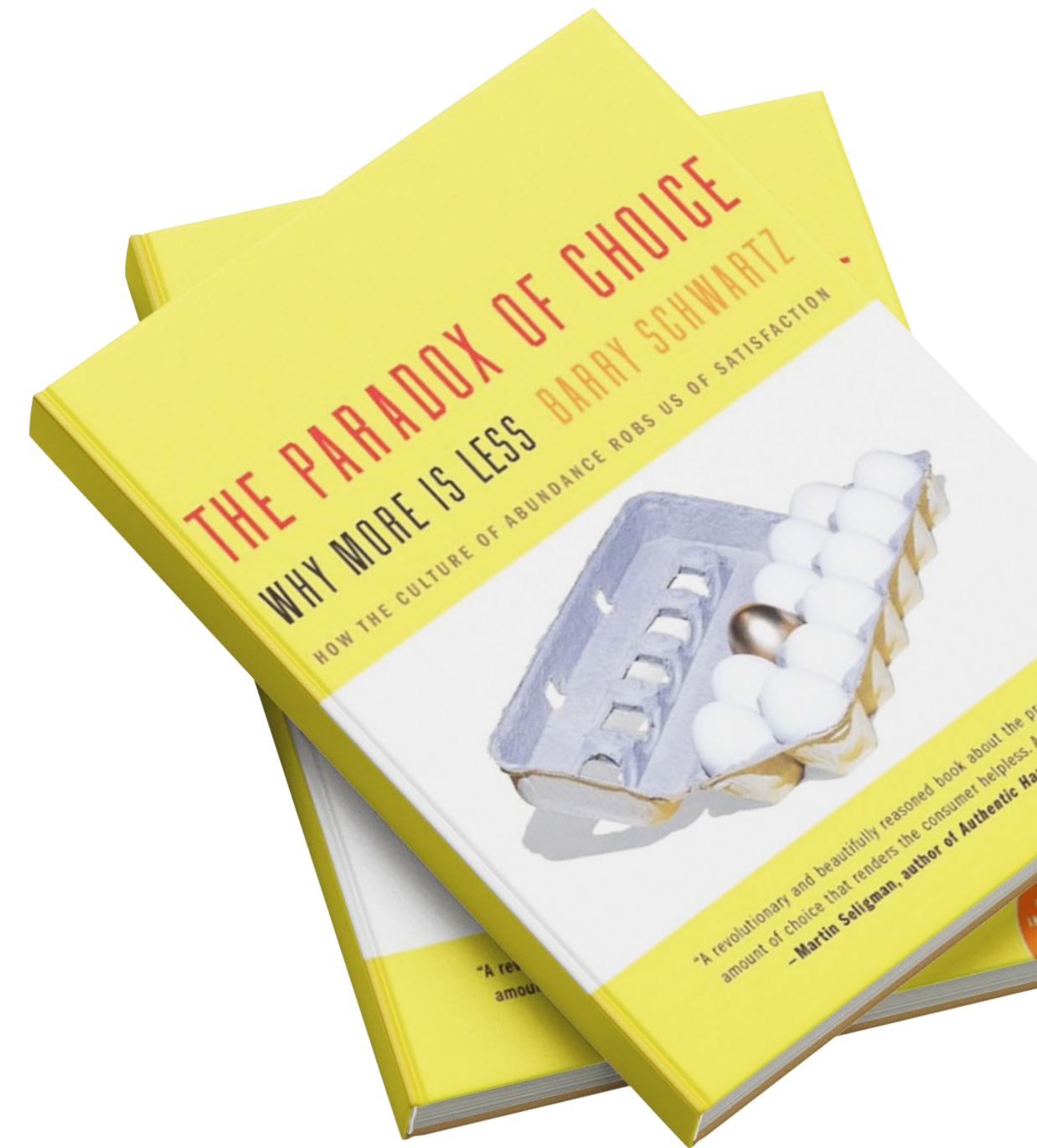
# 3 Forces Behind Customer Centricity



# What's in it for the customer?

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## Simpler choice



# What's in it for the bank?

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## Customer satisfaction



# Summary

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1. The old and the new in wealth management – it's not all about money.
2. Values, expertise, benefits - this is what personalization is about.
3. Client-centricity: simpler choice and increased loyalty.





# Thank you

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