

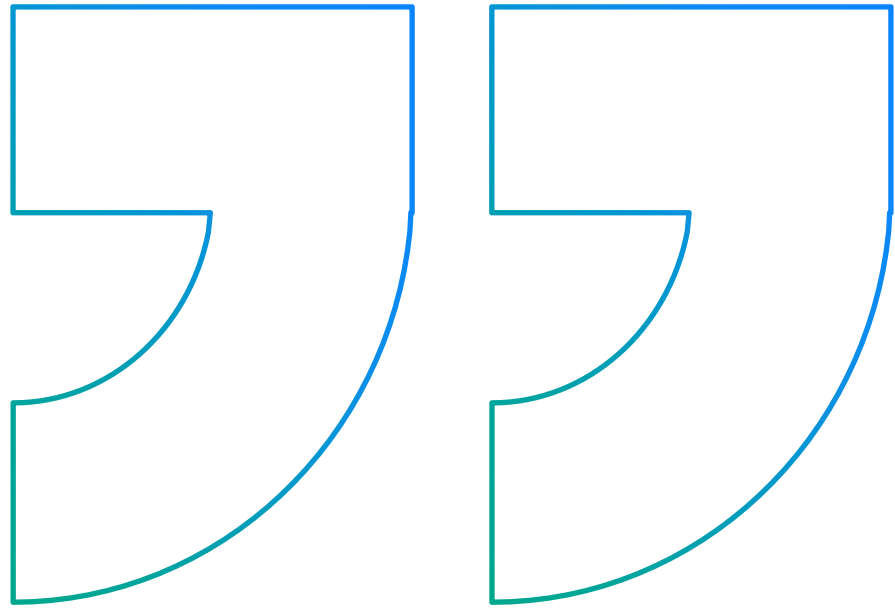
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Customer-centricity in Wealth Management

Lessons learned

Grzegorz Prorowicz, PhD

Consulting Director , Comarch



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

Banking of today...



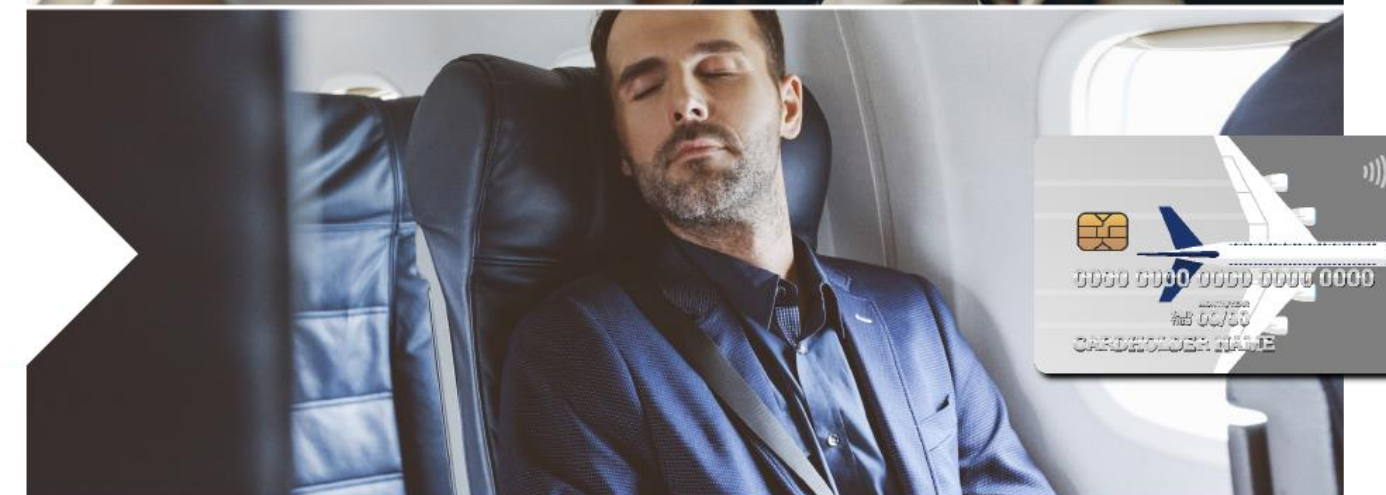
Private banking

First class



Priority banking

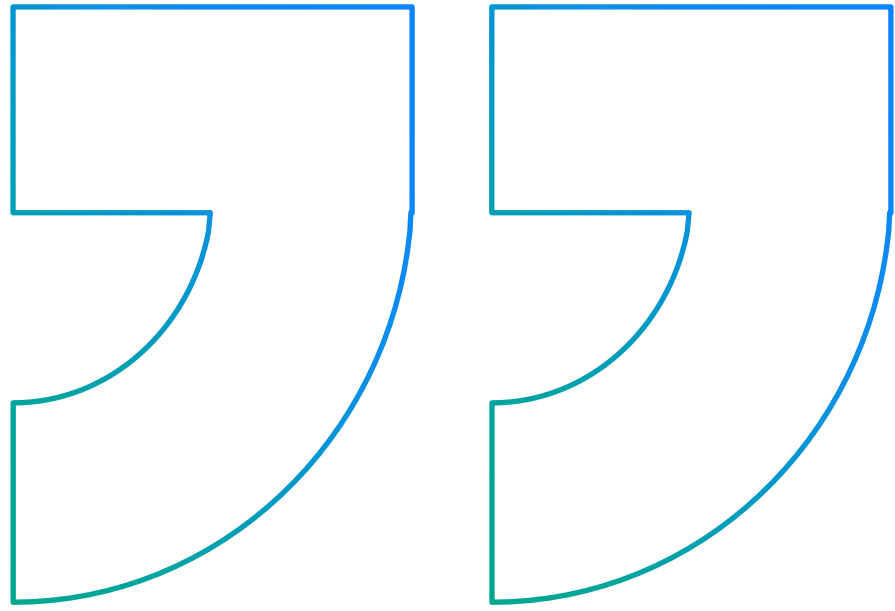
Business class



Retail banking

Economy class



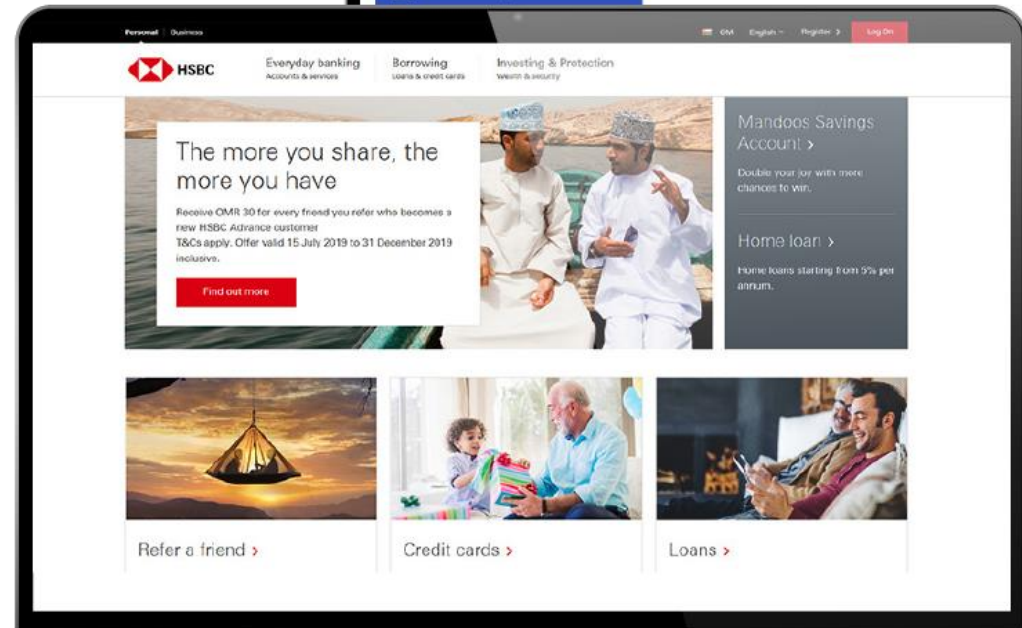
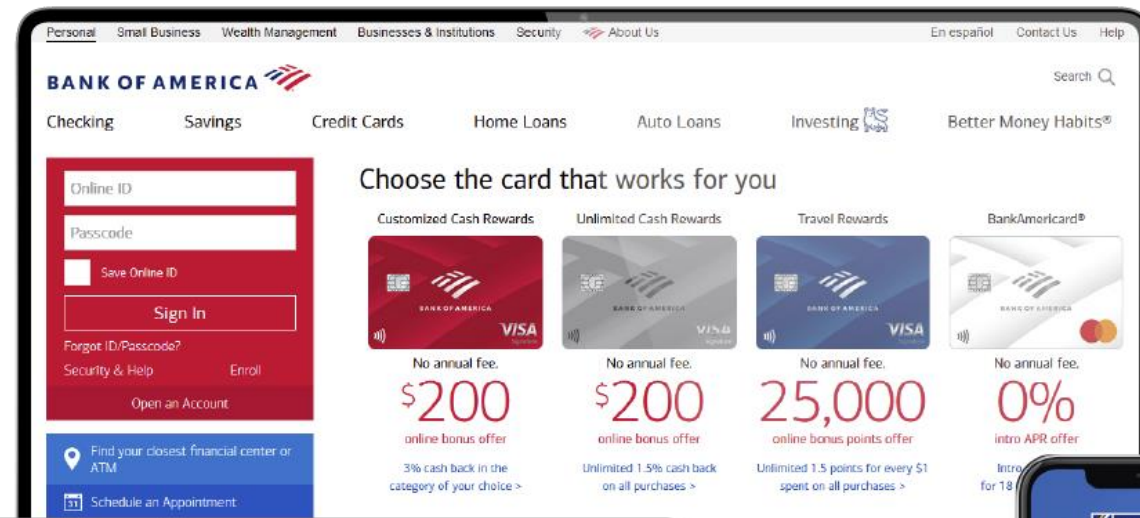


Even if you only purchase
clothes twice a year, you
wear them every day.

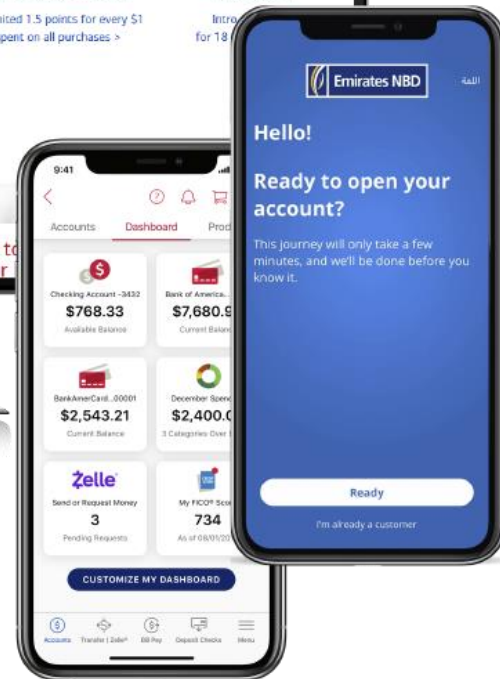
Marc Abraham, BCG

Banking of tomorrow?

BANK OF AMERICA 

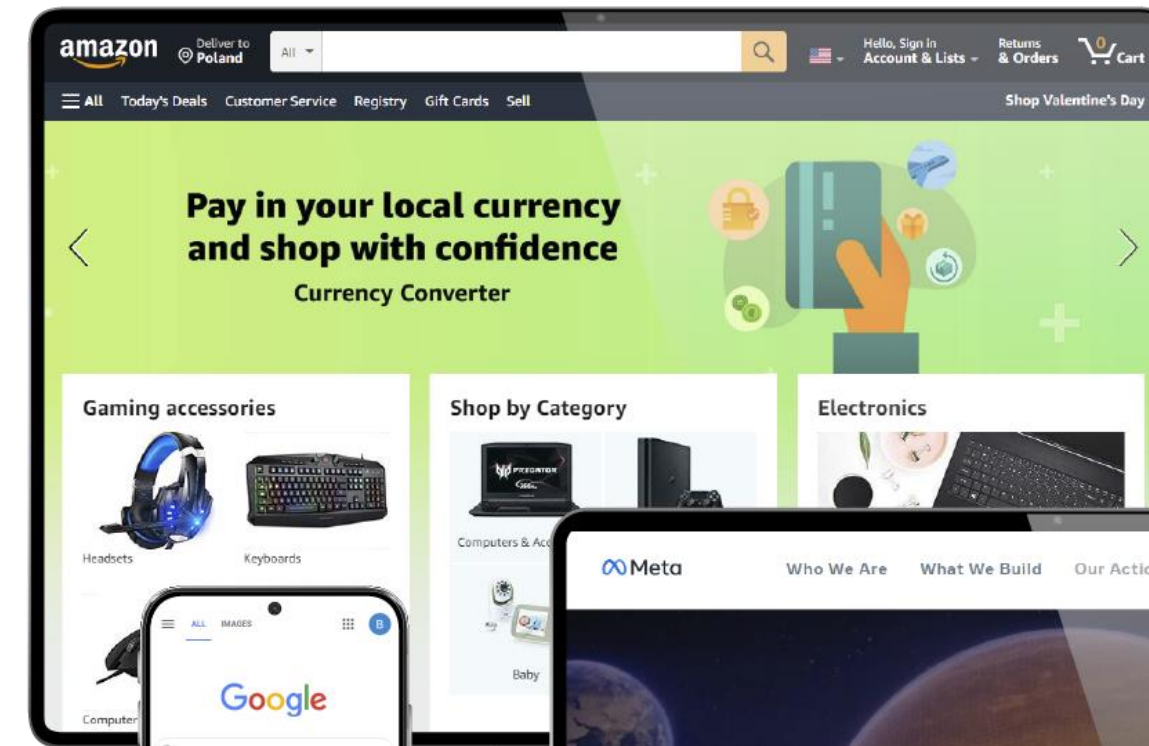


 **HSBC**



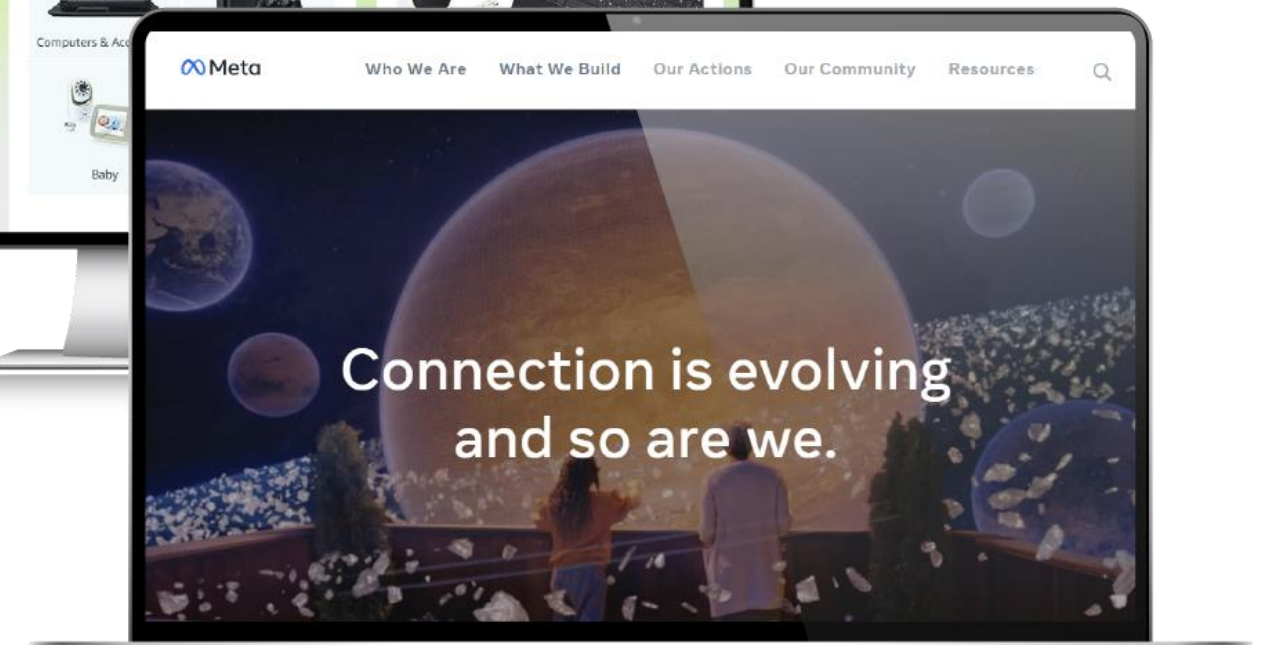
 **Emirates NBD**

amazon 



Google

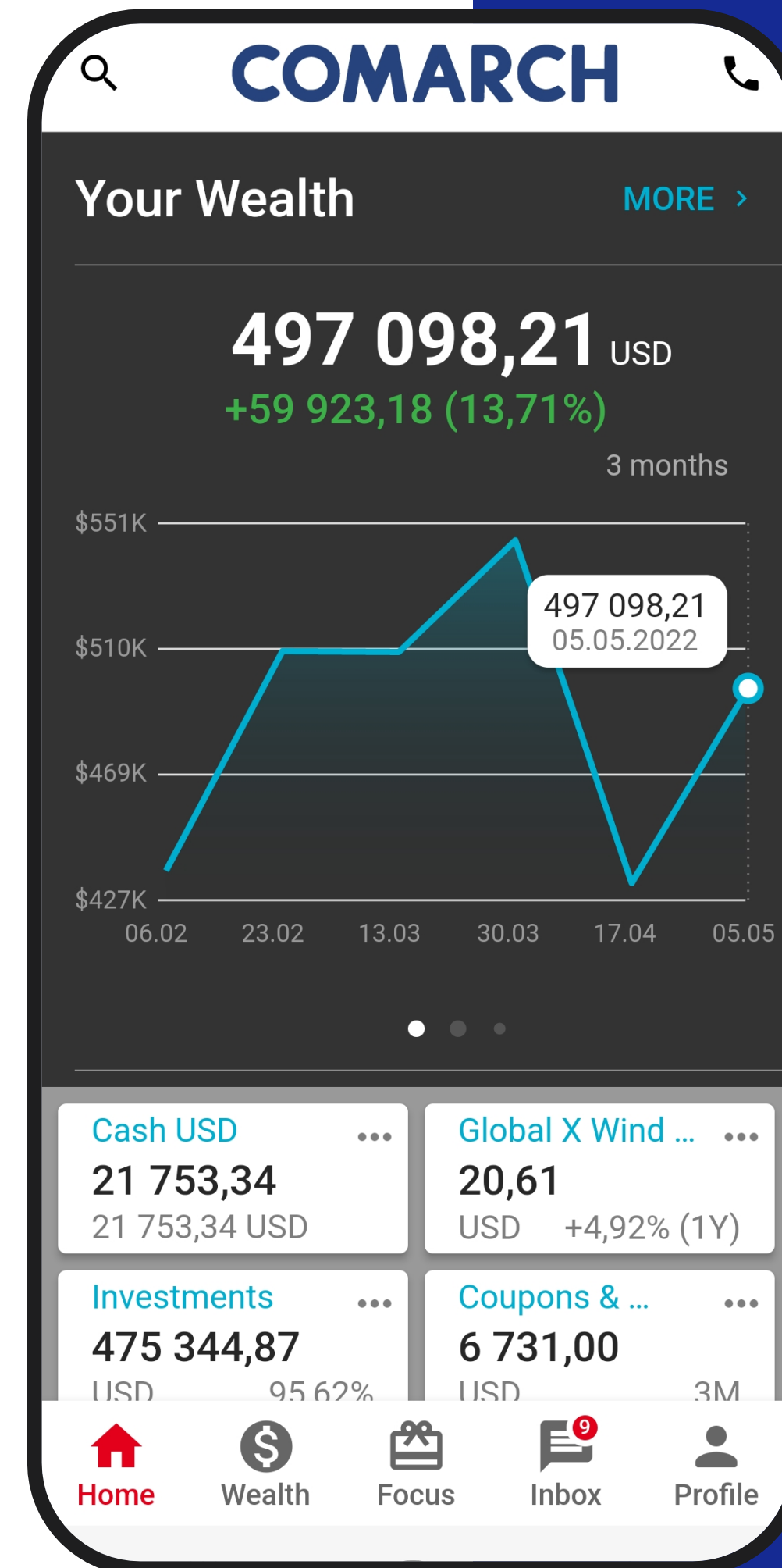
 **Meta**



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Demo

Customer-centric experience
in wealth management



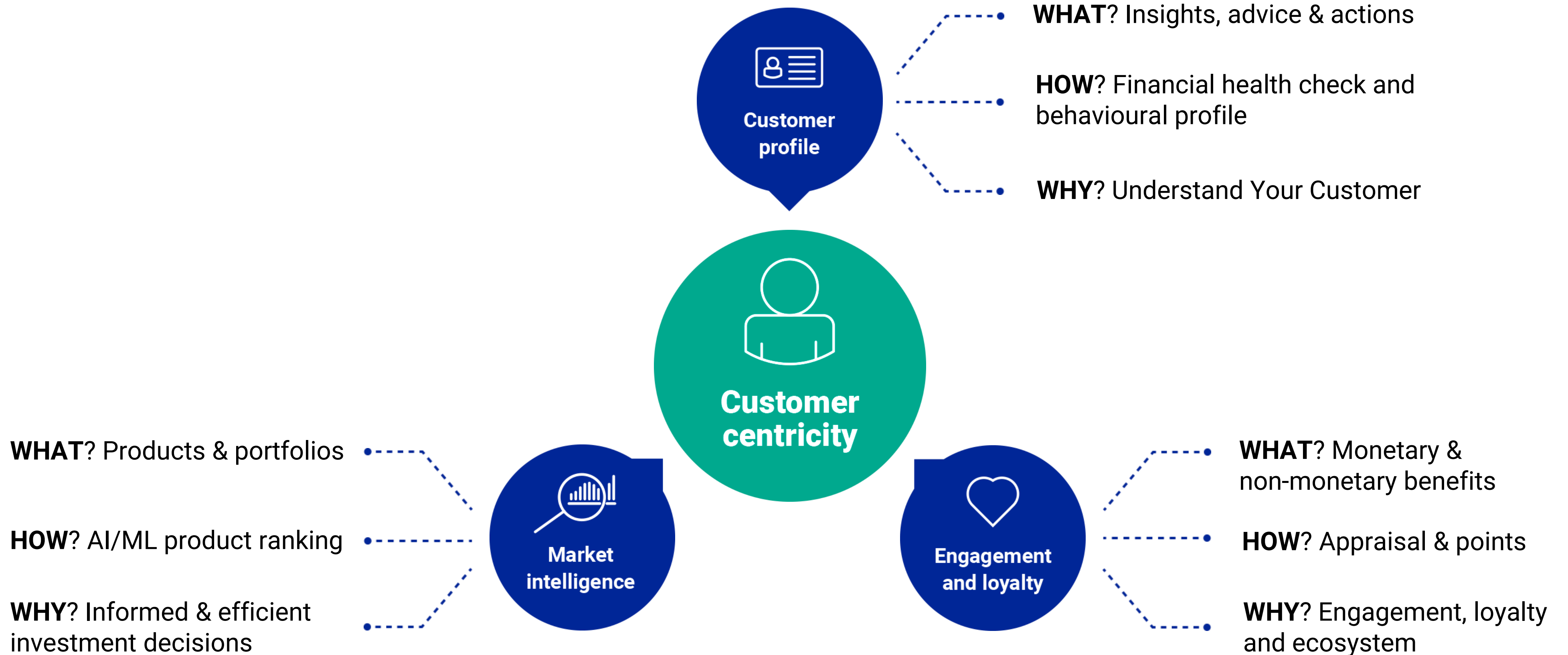
What personalisation the customers expect?

Values.

Expertise.

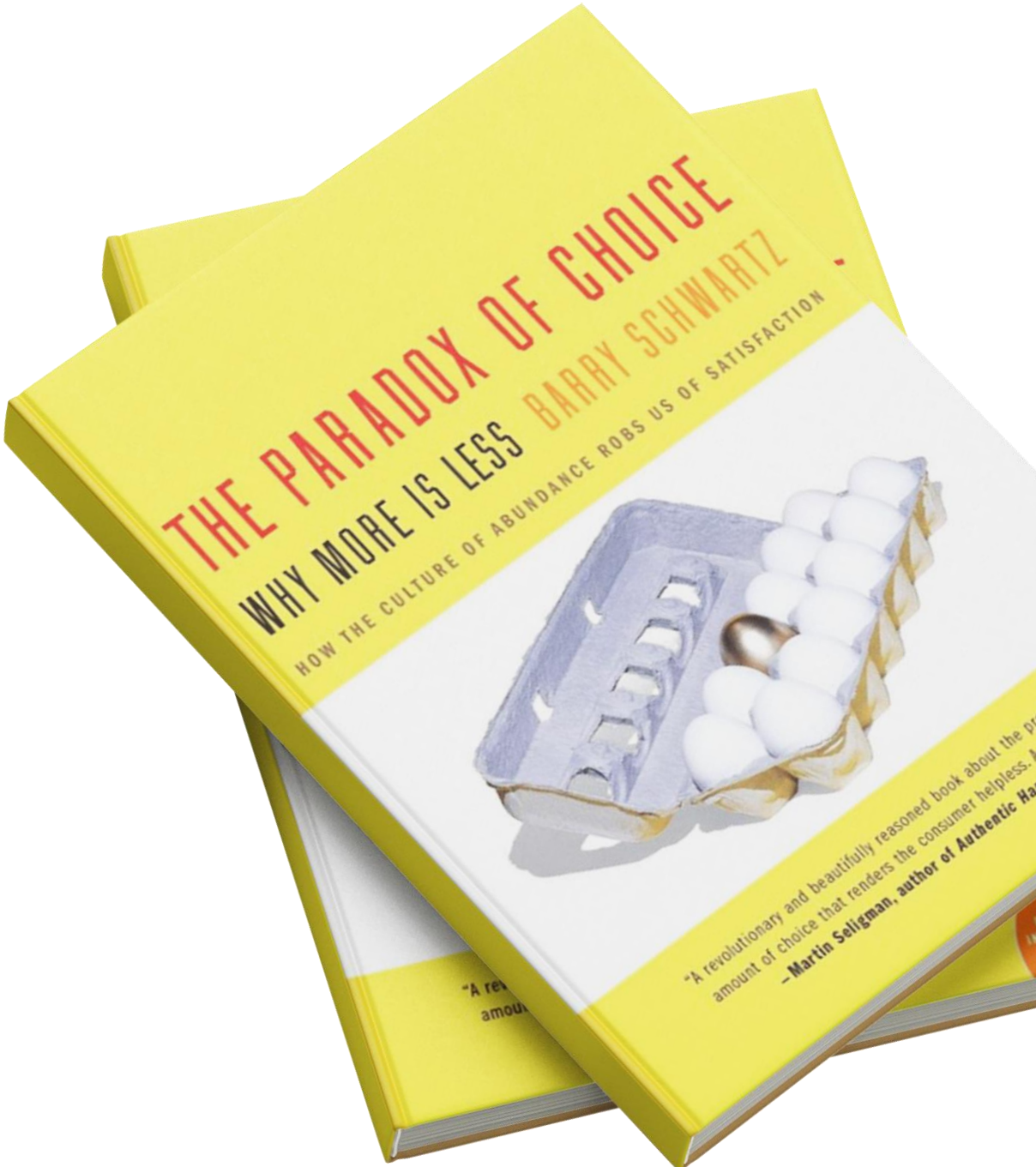
Benefits.

3 Forces Behind Customer Centricity



What's in it for the customer?

Simpler choice



What's in it for the bank?

Customer satisfaction



Summary

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
