

# Improved Suitability of Investment Reports for Clients

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## Problem

- 25% of clients of an investment bank which offered them a tailored investment service did not require, or had difficulty interpreting, investment reports sent to them

## Objective

- Improve suitability of investment reports for client use
- Reduce % of unclear and unwanted reports

## Results

- Systematic process put in place for understanding client needs for frequency and content of reports
- Foreign exchange settlement reports format improved
- Report format questionnaires set up for new clients

## Business benefit

- Number of unwanted reports reduced by 90%
- Number of unclear reports reduced by 65%
- \$42k savings
- Client satisfaction improved

