

# Unlock rock solid growth

Banks can enhance business growth by optimizing internal processes, better utilizing existing private banker resources, and expanding the pipeline organically to materialize new opportunities. This approach can be a practical and cost-effective alternative or a valuable addition to hiring, marketing, and events investments.

## **The business acquisition challenge**

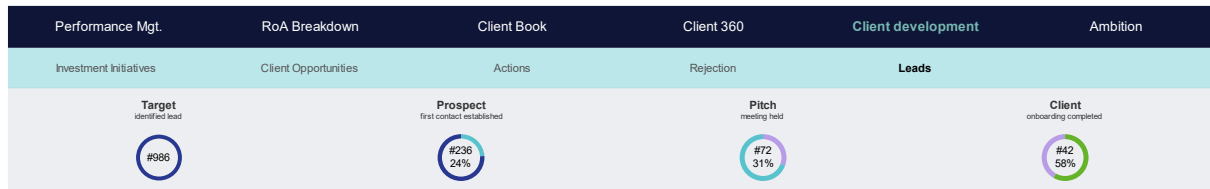
Private banks typically invest heavily in hiring private bankers, which involves substantial upfront costs for candidate search and recovery periods until the individual's revenue contribution covers the direct compensation. However, these hires often lead to disappointment, as only 20-40% of private bankers fully achieve their initial business plans regarding new business volume and timing.

This pattern extends to the entire front office organization, where a select few private bankers deliver consistent growth. Despite not being fully loaded, private bankers often struggle to meet their growth targets regularly, facing difficulties in accessing and converting new leads. Wealth managers frequently need to pay more attention to the potential of adopting a more systematic approach to new client acquisition in this context. They can increase organic growth with existing resources by aligning their organization and processes.



## How we can support you

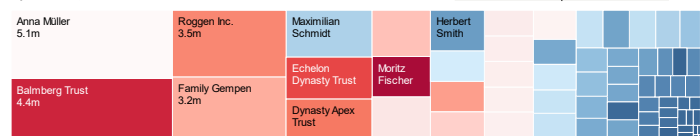
We have assisted wealth managers in refining their market strategy, optimizing sales processes, delivering targeted sales training, and maximizing growth opportunities presented by existing clients. Additionally, we offer insights into innovative lead-generation tactics and effective identification and outreach process management to attract new prospective clients. Our goal is to assist you in establishing a sustainable new business pipeline for continued growth.



### Top RM (by effective NNA)

RM	Leads #	Open cases #	Clients #	NNA	Conversion
Grand Total	986	199	42	370m	4%
Connie Ingersoll	28	11	3	35m	11%
Anna Duszbiber	16	7	1	20m	6%
Jill Gerrie	14	5	1	15m	7%
Carrie Baugher	9	5	1	14m	11%
Aquila Audax	16	7	1	14m	6%

### Open cases (probability adj. expected NNA)



### Top converted leads

click on client to show Client 360

Client	RM	Situation	Strategy / Offering	Next Steps	
<a href="#">Helen Wasserman</a>	Connie Ingersoll	Sold his IT solution company (48 FTE) to a private equity fund. 20m cash-out + additional earnout until 2025	Pitched Balanced discretionary mandate in combination with selected PE investments over the next 5-7 years...	Present European Mid-Small PE vintage fund, check on minimum ticket	15m
<a href="#">Erica Smith</a>	Anna Duszbiber	Business partners, sold 40% share as first stage of succession for their cleaning company	5m conservative portfolio each. Build-up 1e plan until final exit / retirement	Complete investment questionnaire, discuss 1e risk profile.	12m
<a href="#">Andy Reiter</a>	Mark Pierce	Former CS client, unhappy because of RM situation (high turnover due to merger). Open for new relation.	6m advisory mandate (Premium), 1.5m in Cash, Mortgage (1.8m) when due in 2025	Account opening documents sent.	8m

A systematic prospecting strengthens the business pipeline and may increase NNA of RM engaged by up to +50%.

## Where to start

Our growth check offers a swift and effective method to evaluate your organization's maturity and highlight untapped potential that is accessible through a more systematic approach to client acquisition. Within 3-4 weeks, you will receive an overview of your status quo and a concise set of potential improvement measures, including quick wins.

This approach is grounded in a structured and proven assessment framework that spans ten key dimensions crucial for organic business growth. Key performance indicators (KPIs) related to business growth and lead conversion complement the qualitative assessment. We develop measures systematically and tailor them to your strategic objectives, organizational structure, and operational setup.

## About us

The savvy consulting boutique delivers strategic offering design, effective sales, and holistic revenue management and powerful analytics. Our consultants are experts in data-driven client development. savvy consultants have vast experience providing strategic initiatives and business projects for renowned banks and wealth managers. With a high entrepreneurial spirit, they will improve your top line.

## Get in touch

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