DIMENSIONAL 360®

Dimensional

GLOBAL INVESTOR STUDY

Insights into your firm—from a client's point of view

As your firm grows and evolves, knowing how your clients feel and what they value most is more important than ever.

The Global Investor Study helps you gather direct feedback on how your firm can deliver a better client experience and use the insights gained to better identify the clients you most want to replicate.

You can gain deeper insights into your clients' views on a range of issues, including:

- What they want in an advisory relationship
- How they measure your value
- Their overall satisfaction with your business and advisor attributes
- Why some clients refer and others do not

Benefits

Participation in the study can help advisory firms:

- Evaluate their value offering from their clients' viewpoint
- Identify ways to improve service efficiency
- Gauge client expectations in the current financial and market environment
- Assess client willingness to refer, as indicated by their Net Promoter Score (NPS)
- Discover areas of opportunity and potential risk
- Use the insights gained to develop a target client profile for their business development strategy

Study Content

This customizable client feedback survey begins with a set of standard demographics questions, then allows for a selection of questions from the following categories. All responses are completely anonymous.

Demographics: Though not required to answer, all clients are asked demographics questions, including their age, gender, asset level, employment status, and more.

Value and Services: These questions help advisors get a closer look into what really matters to their clients and how they have benefited from their received services.

Client Engagement and Interaction: How often are you meeting with your clients? Does that align with what they want or need? What is their preferred method to meet or communicate? Utilize these questions to find out.

Investments: These questions remain high level, capturing attitudes toward investing, rather than opinions on investment vehicles.

Referrals: Focusing on organic growth? The questions in this section target advisor introductions and referrals.

Open-Ended Questions: Firms can ask up to two open-ended questions, where clients can respond in paragraph form. These questions can be custom.

How It Works

The Global Investor Study is executed through a secure online questionnaire. All firms working directly with Dimensional are invited to participate and can do so at any point during the year.

Ready to participate? Want to learn more? Reach out to your Regional Director for next steps.

1. **Request Invitation:** Reach out to your Regional Director for more resources or to register.
2. **Register for the Global Investor Study:** Complete a brief survey capturing your firm's details.
3. **Customize Your Survey:** Determine which questions to ask your clients.
4. **Test Your Survey:** Ensure your survey displays and functions according to your expectations.
5. **Craft Your Communications:** Using provided templates, prepare invitation, reminder, and thank-you emails to send to your clients.
6. **Send Your Survey:** Copy and paste the provided URLs of your customized survey into your client communications.
7. **Access Your Results:** Log on to your reporting dashboard to review your clients' responses alongside peer data.

Did You Know?

In addition to providing data through the Global Investor Study, Dimensional Practice Management also offers firms an opportunity to evaluate their business, compare themselves to like-minded peers, and assess best practices for driving growth and business value through Dimensional's **Global Advisor Study**. To learn more about the Global Advisor Study and how to participate, please visit *MyDimensional*.

*Dimensional 360 is a suite of services available to a community of financial professionals who work with Dimensional Fund Advisors. Learn more *here*.

Interested in learning more?

Visit MyDimensional at: *my.dimensional.com/global-investor-study*

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