



INCEDO DIAGNOSTICS

Deliver best-in-class digital experiences to your customers based on peer insights powered by deep research and incisive benchmarking models.

As the Advisor solutions space becomes increasingly complex, identifying the right problem to rapidly set priorities right early on is critical to stay ahead. The Diagnostic is a forward looking approach which brings clarity on where Wealth Management firms need to invest to unlock opportunities for Advisors to grow and serve clients better.

**Proprietary Data | Advisor Research |
Advisor Intelligence**

With our rapid assessment and proprietary benchmarking data, we help identify market opportunities, build seamless advisor and investor experiences and build a prioritized roadmap to help our clients differentiate and win in the market.

We help Wealth Management firms in the following areas:



Advisor Journey Diagnostics

Identify and address opportunities in your Advisor journey improving onboarding, proposal generation, portfolio construction, and financial planning. The diagnostic leverages KPI benchmarking, research, and expert insights to provide a detailed roadmap for improving Advisor productivity, engagement, and retention.



Operations Diagnostics

Stay the course and beat uncertainty with our KPI and impact-led Ops Diagnostics. With this assessment, we help you build a roadmap to transform your operating model for the digital age, automate and digitize your processes and enable continuous improvement through impact measurement.



Data Diagnostics

Get a comprehensive view of your firm's data readiness with our maturity assessment across the stages of your data value chain. With this assessment, we help identify high-impact use cases to drive AUM growth and enable data-driven decisions across your organization for significant ROI on data investments.



Advisor Intelligence

Supercharge growth and get the insights you need to stand out in today's crowded marketplace with Advisor Intelligence. Our proprietary datasets with deep insights on Advisor segments, personas, needs, wants and industry trends give the data-driven edge to identify features and capabilities that will set your firm apart from the competition.

30%

Reduction in processing time for custody

12%

Improvement in net flows

8-10%

AUM Growth

5%

Growth in lead propensity