



Introduction

A questionnaire was sent to all St. James's Place clients with a copy of their annual report, asking for feedback on a number of key areas including the relationship with you, their Partner, and the St. James's Place proposition. Clients were also asked about their levels of concern regarding the potential impact on their investments following the EU referendum and the US Presidential election.

In total, 38,870 completed questionnaires were received, including 32 of your clients. This represents 5% of your existing client base. This report shows your results compared with St. James's Place overall results.

TOTAL SURVEYS RECEIVED

32

ONLINE SURVEYS RECEIVED

0

ACTIONS IDENTIFIED

0

OPEN COMMENTS RECEIVED

11

	Total number of surveys received			Met Partner in the last year			Excellent / Good value for money			Would recommend St. James's Place			Have already recommended		
	2015	2016	2017	2015	2016	2017	2015	2016	2017	2015	2016	2017	2015	2016	2017
SJP Overall	47,709	33,378	38,870	76%	76%	78%	83%	79%	81%	97%	95%	97%	46%	58%	54%
997065T	33	25	32	76%	76%	79%	77%	68%	77%	100%	91%	94%	32%	43%	48%

		Partner Performance Scores	
		% positive	SJP Overall % positive
Key Metrics	Have already recommended	48%	54%
	Very Satisfied / Satisfied	94%	94%
	Excellent / Good value for money	77%	81%
	Met Partner in the last year	79%	78%
Key Drivers of Recommendation	Partner available for advice	90%	91%
	My financial objectives are being met	90%	92%
	Frequency of meetings	83%	90%
Other Metrics	Appropriate level of contact	87%	92%
	Partner provides relevant information	83%	85%
	Communications easy to understand	87%	88%
	Advice helps me feel better informed	87%	88%

At least 5 percentage points greater than SJP Overall
At least 5 percentage points less than SJP Overall



Key Areas to Focus On

SLD Consulting Ltd (997065T)

Top 3 Highest Scoring Questions:

	% POSITIVE
Taking everything in to account, how satisfied or dissatisfied are you with your overall relationship with St. James's Place?	94%
My Partner is always available when I need advice	90%
I feel that my financial objectives are being met	90%

Bottom 3 Lowest Scoring Questions:

	% POSITIVE
Please tick the box that best describes your view of the St. James's Place proposition in terms of value for money	77%
When did you last meet with your St. James's Place Partner to review your financial affairs?	79%
I am happy with the frequency of meetings I have with my Partner	83%

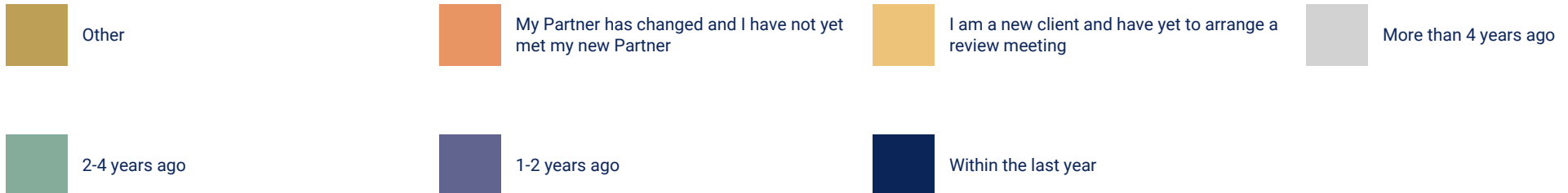
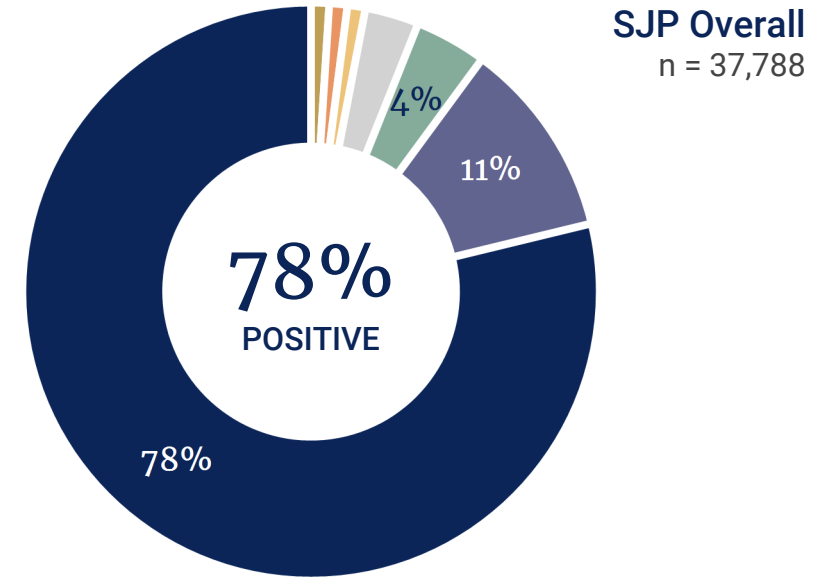
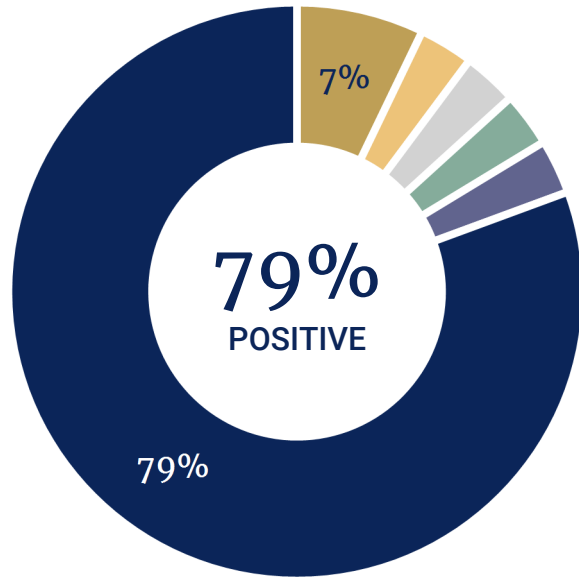
Headline Results

	% POSITIVE	% NEGATIVE
I am happy with the frequency of meetings I have with my Partner	83%	10%
The level of contact I receive is appropriate to my needs	87%	10%
My Partner is always available when I need advice	90%	6%
My Partner contacts me when they have relevant information to share	83%	10%
I receive communications that are easy to understand	87%	6%
The advice I receive from St. James's Place helps me feel better informed	87%	10%
I feel that my financial objectives are being met	90%	10%
Please tick the box that best describes your view of the St. James's Place proposition in terms of value for money	77%	0%
Taking everything in to account, how satisfied or dissatisfied are you with your overall relationship with St. James's Place?	94%	3%
Thinking about your overall experience, would you recommend St. James's Place services to others?	94%	6%
Are you happy for us to provide details of your feedback to your St. James's Place Partner?	97%	3%

Question Summary

SLD Consulting Ltd (997065T)

Q1.
When did you last meet with your St. James's Place Partner to review your financial affairs?



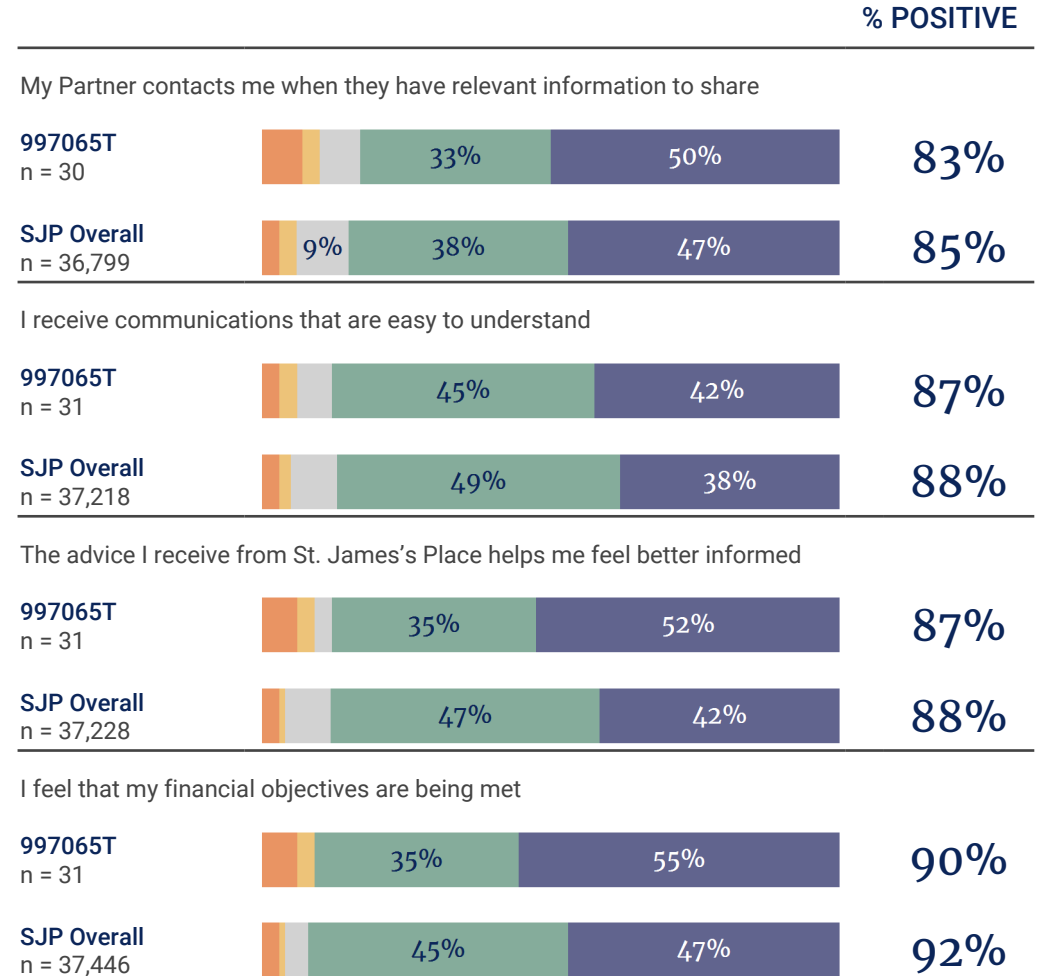
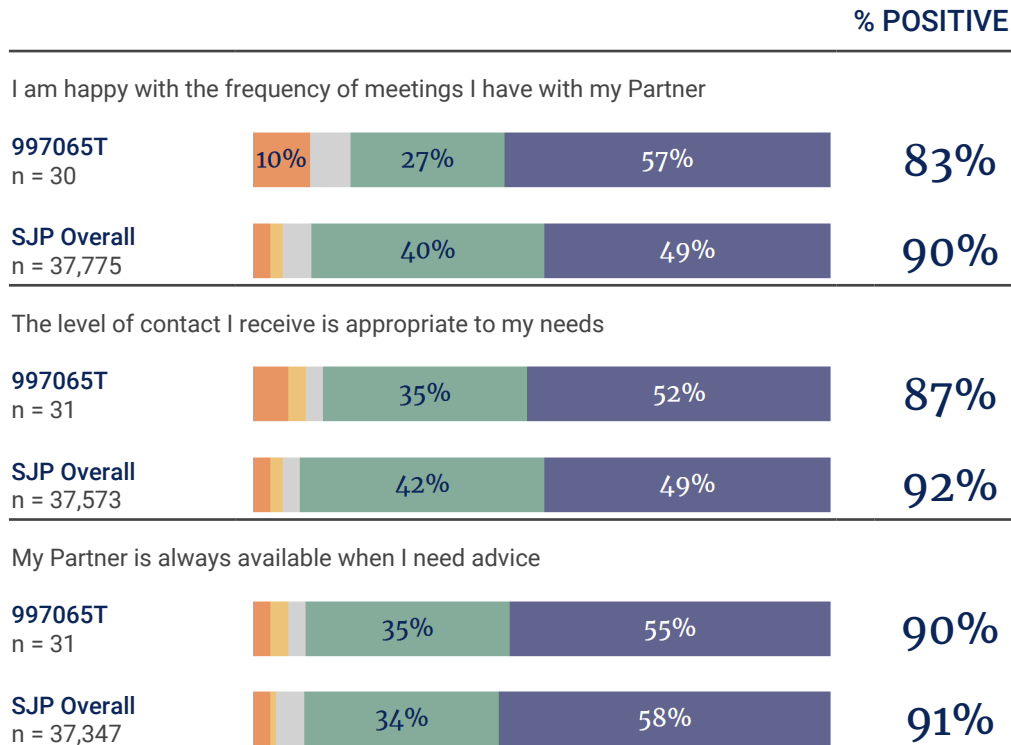
Question Summary

SLD Consulting Ltd (997065T)

RESPONSE SCALE



Q2.
When thinking about your relationship with your St. James's Place Partner, to what extent do you agree or disagree with the following statements:

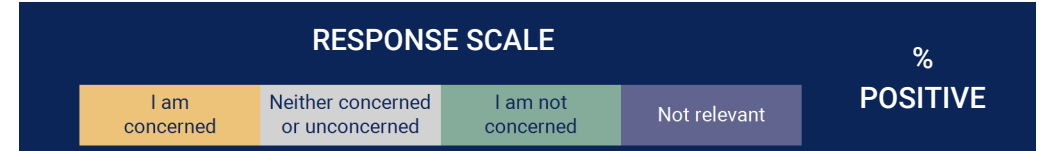


Question Summary

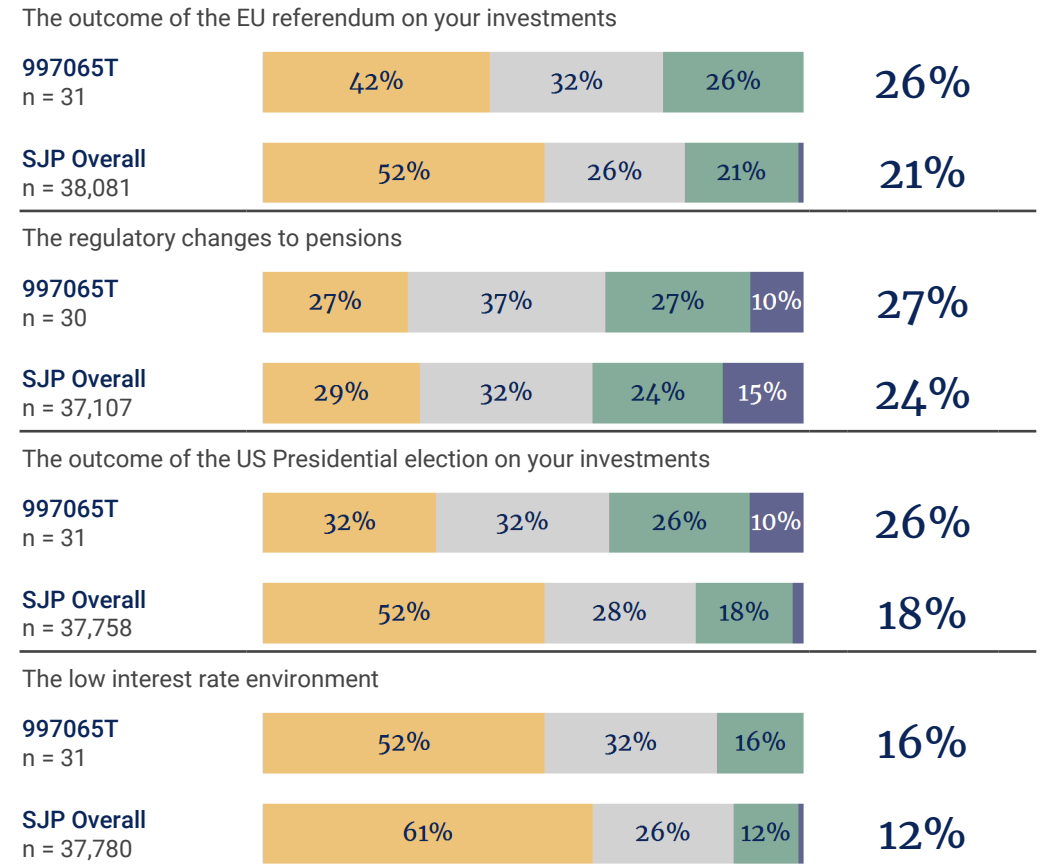
SLD Consulting Ltd (997065T)

Q3.
Is there any further feedback you would like to provide about the relationship with your St. James's Place Partner?

9
of your clients provided a response to this question.
Please refer to the client comments section of this report.



Q4.
How would you describe your level of concern about the potential impact of the following?



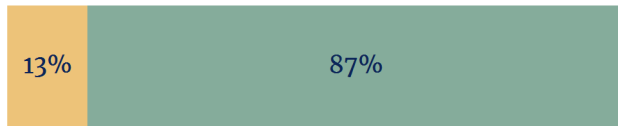


Question Summary

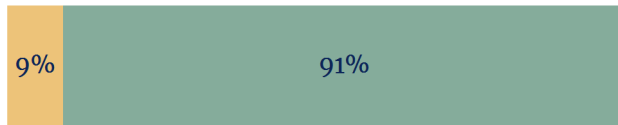
SLD Consulting Ltd (997065T)

Q5.
How informed do you feel
St. James's Place has kept you about
the above events?

997065T n = 30

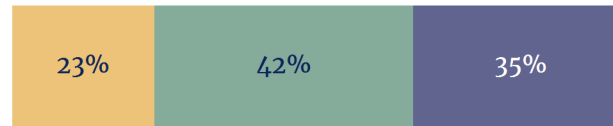


SJP Overall n = 37,141



Q6.
Please tick the box that best describes
your view of the St. James's Place
proposition in terms of value for
money

997065T n = 31



SJP Overall n = 38,080



Q7.
Taking everything in to account, how
satisfied or dissatisfied are you with
your overall relationship with
St. James's Place?

997065T n = 31



SJP Overall n = 38,498





Question Summary

SLD Consulting Ltd (997065T)

Q8. Thinking about your interactions with other organisations, is there anything else that you would like St. James's Place to provide or improve on in the future?

1

of your clients provided a response to this question. Please refer to the client comments section of this report.

Q9. Thinking about your overall experience, would you recommend St. James's Place services to others?

997065T n = 31



SJP Overall n = 38,213



Q10. Is there any further feedback you would like to provide?

1

of your clients provided a response to this question. Please refer to the client comments section of this report.

Question Summary

SLD Consulting Ltd (997065T)

Would you be happy to participate in further research in the future to explore other topics and better understand your views?

997065T n = 31

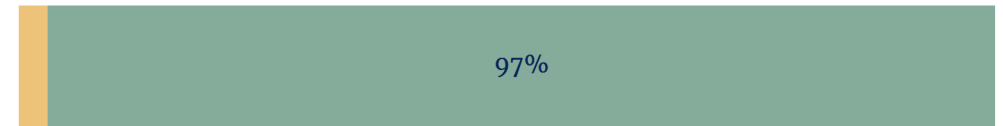


SJP Overall n = 37,613

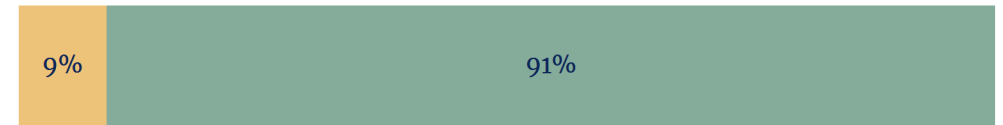


Are you happy for us to provide details of your feedback to your St. James's Place Partner?

997065T n = 31



SJP Overall n = 38,423





Client Comments

SLD Consulting Ltd (997065T)

Q3. Is there any further feedback you would like to provide about the relationship with your St. James's Place Partner?

Excellent advice given at all times.

Excellent communication with St. James's Place partner.

How quickly and efficiently the changeover from my previous provider to St James was and the flexibility of meetings arranged.

I feel very satisfied with the contact, help and advice provided and am impressed by the growth my investment has achieved in the past year!

I know he is there for me if needed and has always responded to queries and requests sympathetically.

Jason ? - excellent!

Jason Moore is an excellent partner, and represents St. James's very professionally, thank you Jason.

Jason Moore is extremely helpful at all times and clearly explains everything.

My advisor is knowledgeable, approachable and patient. No concerns or complaints from myself. Thank you.



Client Comments

SLD Consulting Ltd (997065T)

Q8. Thinking about your interactions with other organisations, is there anything else that you would like St. James's Place to provide or improve on in the future?

All very satisfactory at the moment.



Client Comments

SLD Consulting Ltd (997065T)

Q10. Is there any further feedback you would like to provide?

Would be very disappointed if I was allocated someone other than Jason Moore.



Time for Action

SLD Consulting Ltd (997065T)

Stop

What can be reviewed that isn't adding value to the client experience?

Start

What ideas and initiatives can be implemented that would improve the client experience?

Continue

How to maintain positive feedback from clients?

Top 3 areas for action	Target / success measure	Resources required	Owner	Timescales
01.				
02.				
03.				