



## PR/FAQ

### **Team Crawford**

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## **Crawford Investment Counsel Transforms Client Experience**

*Empowering Clients with Intuitive Website Enhancements and Streamlined Services*

ATLANTA, Month XX, 2024 – Crawford Investment Counsel, a trailblazer in wealth management, is proud to announce the successful implementation of groundbreaking enhancements that have redefined the client experience. With an unwavering focus on usability, storytelling, and data-driven strategies, Crawford has elevated the financial journey for high-net-worth individuals (HNWIs), consultancies, and endowments and foundations to unprecedented heights.

"My family and I have been loyal clients of Crawford for years, and the recent improvements have been truly remarkable," said John Weatherford. "The redesigned website and streamlined processes have made navigating my investments so much easier. It's reassuring to see a financial partner dedicated to my unique needs."

Extensive UX research has led to a remarkable transformation of Crawford's website. The revamped navigation bar, specifically designed for three distinct user pools, has delivered an intuitive and seamless browsing experience. The transparency and effectiveness of introductory and proposal materials, as well as a referral system, have been revamped to align with client expectations. This strategic change has simplified their understanding of Crawford's services, enhancing their overall experience. This overhaul has also been instrumental in expanding the client base. The formalization of data collection processes has revolutionized client tracking and service quality. This data-driven approach has ensured that clients receive highly personalized and responsive service in addition to their commitment to client feedback.

"Crawford Investment Counsel has always been dedicated to providing exceptional service and innovative solutions to our clients," said founder, John Crawford. "I'm thrilled to see the excitement and positive impact these improvements have had on our clients' financial journeys."

Crawford Investment Counsel's unwavering commitment to innovation, data-driven insights, and personalized service for all clients. Crawford celebrates the resounding success of these initiatives, which have empowered clients to build a brighter financial future.

### **About Crawford Investment Counsel:**

Crawford Investment Counsel is a leading wealth management firm dedicated to providing tailored investment solutions for high-net-worth individuals and families. Crawford is committed to enhancing the client experience through innovation, data-driven insights, and personalized service. Learn more at <https://www.crawfordinvestment.com/>

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## **Frequently Asked Questions**

### **What is Crawford Investment Counsel and what do they do?**

Crawford Investment Counsel is an independent firm of registered investment advisors who help clients build custom portfolios of high-quality investments. Crawford has been serving clients for over 40 years and has grown to include over 50 employees and over \$7B in assets under management. Based on client goals and proprietary in-house research, Crawford designs a tailored investment program to help clients achieve their goals and build lasting wealth.

### **Why should I choose Crawford over other investment firms/what distinguishes Crawford from other firms?**

Crawford is a smaller independent firm focused on offering individualized client service and high-quality investments. Our portfolio managers prioritize long-term relationships with clients and strive to best align investment strategies with our clients' goals. We are focused on investment strategies that will generate income, protect clients from the economic downside, and focus on growth in an industry of portfolio abandonment and inflation. Crawford will help clients sleep well at night by providing upside growth and downside protection.

### **What are the key improvements Crawford Investment Counsel has made to its services?**

Crawford Investment Counsel has implemented several transformative changes to enhance the client experience. These improvements include a revamped website with intuitive navigation, redesigned introductory and proposal materials, innovative referral methods, formalized data collection processes, advanced website tracking, and a greater focus on client feedback and recruiting statistics.

### **How will the revamped website benefit clients?**

The revamped website features intuitive navigation tailored to different user profiles, ensuring clients can access the information they need more easily. It also highlights engaging content, making it simpler to find valuable insights and expert opinions.

### **How do the innovative referral methods work?**

Crawford Investment Counsel has made it easier for clients to refer and choose the firm. These methods aim to enhance the client experience by streamlining the referral process and facilitating connections with high-net-worth individuals.



## **How will formalized data collection processes benefit clients?**

Formalized data collection, including the use of Salesforce, enables Crawford to provide more personalized service. It ensures that the firm has a deeper understanding of clients' needs and preferences, allowing for tailored investment solutions.

## **What insights will advanced website tracking provide?**

Advanced website tracking will provide valuable insights into visitor behavior. This information will guide continuous improvements, ensuring that the online experience meets clients' expectations and needs.

## **How can clients provide feedback on their experience with Crawford Investment Counsel?**

Clients can provide feedback through various channels, including direct communication with their dedicated advisors or through the firm's website. Crawford values client feedback and uses it to enhance services continuously.

## **Are these improvements already in effect, and can clients start experiencing them now?**

Yes, these improvements have already been implemented successfully. Clients can start experiencing the enhanced services and empowered financial journey offered by Crawford Investment Counsel immediately.

If you have more specific questions or need further information, please feel free to contact us directly through our website or your dedicated advisor. We are here to assist you in achieving your financial goals.

## **How does Crawford Investment Counsel plan to maintain the momentum of improvements?**

Crawford is committed to continuous improvement and innovation. The firm will regularly review client feedback, monitor website tracking data, and adapt its services to evolving client needs. The goal is to maintain the positive momentum and provide an ever-improving client experience.

## **Are these changes exclusive to high-net-worth individuals (HNIs), or can all clients benefit from them?**

While these changes are designed to enhance the experience of HNIs, Crawford Investment Counsel is dedicated to providing exceptional service to all clients. The improvements will benefit clients across the spectrum, offering a more seamless and personalized financial journey for everyone.