



Audience and Competitive Audit

Context

The Goldman Sachs Private Wealth Management Client Engagement Team has partnered with 160over90 for research, audit, and consulting services designed to support the team’s two primary objectives:

- 1. Drive loyalty and retention among existing clients
- 2. Drive new business by generating advocacy among existing clients and influencing prospect conversion

Solution

Our deliverables for this project included summary findings, strategic implications, and actionable recommendations based on three workstreams:

- AUDIENCE ANALYSIS to understand the needs and motivations of UHNWIs
- COMPETITIVE LANDSCAPE ANALYSIS to identify best practices and top performers
- AUDIT & ANALYSIS of existing events to optimize strategic planning and execution

We used data and stakeholder interviews to find common themes that would inform our recommendations to the Client Engagement Team to reach their objectives.

1



Process

Process creates pain points.

2



Programming

Access, exclusivity, and personalization drive effective programming.

3

Execution

The GS brand and network are the differentiators.

