



CD *insight*

DIAGNOSE | EMBED | BENCHMARK CONSUMER DUTY

INTRODUCING CDi

Created in collaboration with industry experts, Consumer Duty Insight (CDi) continually diagnoses, embeds, and benchmarks an organisation's end-to-end Consumer Duty programme.

The FCA's Consumer Duty has put increasing pressure on financial services firms to further prioritise the need to deliver good customer outcomes. Two critical factors in a firm's response are their Consumer Duty culture, and the competence of their employees. Yet, measuring, improving, and reporting on these remains a challenge. Firms also have no sight of their progress in relation to their peers and wider sector. There is no industry benchmark today.

CDi provides the solution.



"The Duty isn't something where you can tick the Consumer Duty box on your to-do list and move on. It's something that needs to become part of who you are as a firm, your culture, and how you do business, running across your whole organisation from Board to front-line delivery, from product design to communications and customer support."

Nisha Arora
Director of Cross Cutting Policy & Strategy, FCA



HOW DOES CDi WORK?

CDi utilises Clever Nelly's multi-award-winning AI and continuous assessment technology to assess, improve, and evidence Consumer Duty culture and competence firm-wide, and provides benchmarking data for firms to track their progress against their peers and the wider industry sector. Using, on average, less than one minute of an employee's working day, CDi enables firms to:

KEY BENEFITS

- ✓ **Diagnose** Consumer Duty competence and culture firm-wide on a continual basis.
- ✓ **Embed** a culture of good customer outcomes throughout the organisation.
- ✓ **Benchmark** your firm's Consumer Duty progress against the industry and sub-sectors.

KEY OUTCOMES

- ✓ Improve customer outcomes and reduce risk.
- ✓ Enhance your compliance reporting and standards checking.
- ✓ Provide a new and unique source of data to improve your Consumer Duty board report.
- ✓ Confidently answer the FCA's key culture and governance questions.

