Discovery Series

SYNDICATED RESEARCH

ADVISOR TOUCHPOINTS™: 2009

BEST PRACTICES FOR BUILDING AN OPTIMAL COMMUNICATIONS STRATEGY

A first-of-its-kind report, Advisor Touchpoints™ explores the impact of both push and pull marketing touches on key metrics including loyalty, satisfaction and share of wallet. By revealing best practices for advisor communications, we arm companies with the insights necessary to build an optimal touchpoint strategy given their specific target audience, distribution strategy, and communication objectives. The report also evaluates the current performance of individual companies, "best-in-class" providers, and the industry overall .

Email – Print – Wholesaler Visit – Internal Sales Call – Webinar – Advertising – Website Visits – Press Exposure

Areas of Inquiry

- Unaided recall of specific touches
- Best in class provider on touches
- Number of touches by provider
- Ideal number of touches by type
- Brand equity, loyalty, satisfaction, share of wallet, etc.
- Advisor profile

Analysis and Output

- Impact of broader media outreach
- Industry best practices
- Touchpoint optimization overall, by goal, by channel, advisor profile, brand evolution, and more
- Touchpoint/loyalty driver analysis

What strategy will ensure you are minimizing your spend, yet still maximizing your impact?

Value. Advisor Touchpoints™ provides important insights about the marketplace, as well as identifies specific areas of strength or weakness within your communications strategy.

Findings from the report will enable you to:

- Benchmark the success of your touchpoint strategy vs. key competitors and the industry overall
- Target resources more effectively to optimize current or planned advisor outreach activities
- Tailor outreach and communications efforts to maximize channel and product distribution
- Link touchpoint metrics to performance metrics such as brand equity, loyalty (NPS ®), share of wallet

Methodology. Data was collected via a web-based survey of a representative sample of 1,500 registered representatives and RIAs with an active book of business of at least $5 million in assets. Data was collected in April 2009 .

Pricing. $7,500

To order report or for more information:
Contact Sean Mulkerron at smulkerron@cogentresearch.com or 617-715-7641

The average advisor works with nine fund companies and receives more than 100 touches per month. How will you break through the clutter?

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COGENT RESEARCH

Custom Research
Our custom research produces "actionable insights" that inspire decisions and drive behavior. Solutions include customer loyalty, brand assessment and tracking, product development, and customer acquisition and retention modeling.

Syndicated Research
The most up-to-date, comprehensive understanding of emerging issues and trends lets us continuously generate insight and action strategies for clients. Products and services include research briefs, syndicated reports, and sponsored papers.

Evidence-based Consulting
Our own proprietary data assets combined with client supplied information and primary research to produce powerful insights and recommendations toward product, trend, and client experience. The result is significantly improved bottom-line performance.

Subscription Agreement

Advisor Touchpoints™

DELIVERABLES:

- **Strategic Report:** Written report containing in-depth analyses of survey questions (overall and by key subgroups) and detailed summaries of findings and strategic recommendations.

COST & BILLING PROCEDURE:

- **Cost:** $7,500. *Any travel expenses incurred are not included and will be billed at cost.*
- **Billing:** Payment due upon receipt. No refunds will be given.

TERMS OF USE OF DATA AND REPORT:

- At no time is the entire report, or substantial portions thereof, to be distributed to parties outside of the subscriber's business unit.
- Subscribers are permitted to share selected portions of the report findings only after receiving written permission from Cogent Research. When such permission is granted, Cogent Research must be credited as the source.

Please fill out the form below, sign, and fax back to 617-441-9966.

Upon receipt of the signed agreement an electronic and hard copy of Advisor Touchpoints™ will be mailed to you.

By signing below, I agree to the terms in this Subscription Agreement and agree to pay the fee denoted above.

Name:	Company:
Mailing Address:	
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Signature:	Date:

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