

ADVISOR TOUCHPOINTS™: 2010

Best Practices for Building an Optimal Communications Strategy

Cogent's Advisor Touchpoints™ explores the impact of both push and pull marketing touches on key provider brand metrics including loyalty, satisfaction and share of wallet. This 2nd annual report also includes the use of a breakthrough qualitative research technique, revealing the emotional connection advisors have with current providers. The report further evaluates the current performance of individual firms, identifies "best-in-class" providers on key touchpoint elements, and recommends optimal touchpoint, communication, and distribution strategies.

AREAS OF INQUIRY

- Best in class provider on touches
- Number of touches by provider
- Ideal number of touches by type
- Brand equity, loyalty, share of wallet, satisfaction and more
- Conscious and subconscious feelings towards the provider advisors feel most connected to
- 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
- Emotion analysis by channel and advisor profile

NEW IN 2010

- This year's Advisor TouchPoints™ report includes Emotion Mining, an advanced psychological technique of projection and free association that illuminates advisors' emotional connections to product providers.
- Composite rankings for overall wholesaler effectiveness for 22 leading mutual fund providers.

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 messages and strategies to maximize channel and product distribution
- Link touchpoint metrics to performance metrics such as brand equity, loyalty (NPS®), share of wallet
- Pinpoint your firms strengths and weaknesses on critical elements of overall wholesaler effectiveness.

How does your firm perform on key drivers of wholesaler effectiveness?

METHODOLOGY

Data was collected via a web-based survey of a representative sample of 400 advisors with an active book of business of at least \$5 million in assets. Data was collected in August 2010.

For more
information contact:
info@kogentresearch.com
617-715-7641

Pricing: \$9,500 USD

Copyright © 2010. Cogent Research LLC. All rights reserved.

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 and comprehensive understanding of emerging issues and trends lets us continuously generate insight and action strategies for clients. Products and services include white papers, syndicated reports, and "sponsored" papers.

Evidence-based Consulting

Our own proprietary data assets combine 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.

Cogent Research
125 CambridgePark Drive
Cambridge, MA 02140
PH 617-441-9944
FX 617-441-9966

www.kogentresearch.com
info@kogentresearch.com

