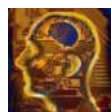


Client work examples



Client Relationship audit

“How are we perceived by our current, lost and not-won clients?”

Client sponsor:	Fund management company
Interview sample:	Pension fund clients, IFA's, Fund Supermarkets
Scope:	UK
Output:	Client feedback on product, performance, people, processes and investment philosophy.
Value:	Confirmation around factors responsible for winning and retaining business.
Bonus :	Identified two firms that were planning to defect and arranged for sponsor to save the business.



Client profile audit

“What do our clients do all day and how does our service help them achieve results?”

Client sponsor:	Financial news provider
Interview sample:	Investment bankers and investment managers
Scope:	Global
Output:	Report profiling the workflow and data needs of 8 different customer segments – from fund managers to interbank brokers
Value:	Customer insights that dramatically altered market positioning and corporate messaging, resulting in new sales and greater brand clarity
Bonus :	Research findings provided basis for keynote speech to 6 European client audiences, resulting in coveted ‘industry educator’ position.



Market Entry testing

“Where is the market for our new or existing service – who, where, how saleable?”

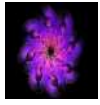
Client sponsor:	Large enterprise software firm
Interview sample:	COO's of Investment banks, private banks, fund management firms
Scope:	London
Output:	List of top 5 issues for back office and recommendations for market entry for firm operating outside the City
Value:	Clarity around niches to target current, strong products to optimise marketing spend and achieve quick wins
Bonus :	Uncovered a new and highly lucrative gap, forged by recent legislation that could be served by existing service with minor tweaks.



Product & Service testing

“How easy is it to use our product, and does it deliver in line with expectations?”

Client sponsor:	Global financial data analysis firm
Interview sample:	Private Banks, IFA's, fund managers
Scope:	Europe
Output:	Direct feedback on the usage experience of a system crucial to their daily jobs, with strengths and weaknesses Vs rivals and clients at risk report.
Value:	Identified 12 major shortcomings in the technology and client management with recommendations to fix them.
Bonus :	The research project engendered feelings of loyalty in many client participants, who felt valued and listened to.



Brand & Communications audit

“What do customers really buy when they choose our service over rivals?”

Client sponsor:	Publisher
Interview sample:	Major corporations
Scope:	Europe
Output:	Insight into what brand means in terms of thoughts, feelings, memories and expectations
Value:	Solid data to launch a marketing campaign that resonates with perceptions ‘already out there’ rather than being based on management hopes
Bonus :	Pleasant surprise around positioning of the brand – clients were grouping them in the premier league, way above the division they chose to play in.



5 Year Anniversary audit

“What is the market’s perception of how we have change over the past 5 years versus rivals?”

Client sponsor:	Investment boutique
Interview sample:	Actuarial consultants, IFA’s, Fund supermarkets, financial press, shareholders.
Scope:	UK
Output:	Comprehensive study of what made people buy, hold and recommend the firm.
Value:	Confirmation that trustworthy people and not performance alone are most critical in tough market conditions
Bonus :	An opportunity for less satisfied clients to request meetings with sponsor firm to refresh their loyalty and understanding of the product.



Partnership search

“What companies out there could we partner with, collaborate with, or sell to?”

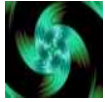
Client sponsor:	Data services firm in financial sector
Interview sample:	CEO's and COO's of content and technology providers
Scope:	Global search
Output:	Shortlist of companies who would complement sponsor firm's offering, with comprehensive CEO interviews from each.
Value:	High level of detail on competitive and collaborative landscape with specific recommendations to partner with one major competitor.
Bonus :	Sponsor firm merged with recommended firm



Lost client audit

“What are the real reasons we lose business, or fail to win it in the first place?”

Client sponsor:	Major news content provider to
Interview sample:	Researchers and CEO's in legal, PR, corporate finance, private equity
Scope:	Global
Output:	Segmentation strategy report showing strengths and weaknesses versus competition
Value:	Evidence that having the best product does not drive loyalty; relationship management and product training proved key
Bonus :	Increased client retention from 65% to 93% in mid-tier segment during next 9 months, equating to an uplift in revenue of \$12m



Changing industry report

“What do clients want today/tomorrow, what are the main gaps and drivers?”

Client sponsor:	Technology services provider
Interview sample:	M&A bankers, lawyers and consultants
Scope:	UK
Output:	Key drivers of industry change with competition report
Value:	Provided 5 key recommendations for change, around product security, sales skills, client entertaining, brand and future functionality
Bonus :	Highly favourable response from clients, 3 rd party research being rare and showing commitment.



Stakeholder 360 survey

“How are we seen by those involved in our success – from clients to press to shareholders?”

Client sponsor:	Major US investment management firm
Interview sample:	Fund of funds managers, private banks, IFA's, CEO's of major corporations
Scope:	Global, including Japan
Output:	A benchmark study describing thoughts and feelings from business leaders across the globe about this firm's performance, philosophy and relationships.
Value:	The report was used as a blueprint for strategy over the following 2 years
Bonus :	Realisation that 2 'star performers' were critical to winning and retaining business, giving rise to urgent succession planning.
