

Client Value Proposition: Apply financial information to improving operational and financial decision making. Understand what drives costs, which products are contributing most to profitability, and measure performance early enough to make intra-period change. Prevent down-side surprises.

Strategic Value: Allocate capital more effectively based on better profitability information, react to risk and problems more quickly through more accurate and timely information.

Information and Analytical Capabilities Provided:

- Measure profitability with sufficient detail to assess performance, investment opportunities, and capital allocation
- Measure operational effectiveness to assess process and manager performance, Identify operational problems, understand cost drivers for pricing decisions
- Track performance relative to plan
- Deliver financial information in near-real time.

Example Analyses:

- What are target and actual revenue by product by time?
- What is direct administration expense by department by market segment for current year total?
- What are FTE metrics (mean FTE's, total revenue per FTE, adjusted revenue per FTE, compensation & other expenses per FTE, operating expense per FTE, and operating earnings per FTE) ?

Meeting Retirement & Investor Services Industry Challenges