

# Plan Sponsor Marketing Analysis Module

**Client Value Proposition:** Cost-effectively market to plan sponsors by executing and measuring successful campaigns to acquire new clients and sell additional products and services to existing clients

**Strategic Value:** Understand the impact and value of marketing efforts across market segments, channels and products and services; measure campaign effectiveness; reduce attrition rates and monitor cost per new client.

**Information and Analytical Capabilities Provided:**

- Analyze response rates, conversion rates and return on marketing investment (ROMI) for each campaign
- Measure sales pipeline metrics (leads generated, number of proposals, potential revenue)
- Analyze acquisition cost per new customer per dollar of sales
- Measure new customers, new product sales and deposits by segment by time
- Compare marketing expenses vs. budget

**Example Analyses:**

- What is the return on marketing investment?
- What is projected / expected and actual response rate by channel by campaign?
- What are the most effective campaigns to launch new products?
- Do bundled services have a better response rates than unbundled ones?

***Meeting Retirement & Investor Services Industry Challenges***