

Client Value Proposition: Cost-effectively acquire new clients and sell additional products and services to existing clients across a variety of sales channels

Strategic Value: Optimize sales channels; Optimize plans/pricing; Improve financial forecasting; Improve profitability of sales; Manage internal sales resources; Design effective sales campaigns

Information and Analytical Capabilities Provided:

- Analyze sales by channel to identify best performers; compare sales with acquisition costs to measure profitability by sales channel
- Understand sales trends by plan type
- Measure accuracy of sales pipeline estimates
- Measure long-term value of sales – client duration, accuracy of estimates of deposits; measure cost of sales
- Accurately forecast sales rep needs; provide appropriate incentive commission compensation
- Measure campaign success; measure sales by client industry, region, participant demographics, etc.

Example Analyses:

- Which sales channels are the most effective and most profitable?
- What are my sales by plan type, client industry, and client location?
- How do my actual deposits compare to projected deposits at the time of sale?
- What are my client acquisition costs per dollar of sales?
- How are my sales reps performing?

Meeting Retirement & Investor Services Industry Challenges