



PREDICTIVE RESEARCH

Trends in Benefits Consulting (Pensions)

The insurance and benefits needs of corporations are changing and consultants must know how their market is changing to maintain their profitability. A survey of major firms that use benefits consultants points to emerging opportunities that help our client position their business for the revenue sources of the future.

Emerging Needs in Wealth Management (Retail)

A mixture of high-end consumer survey and substantial secondary research points to key market segments, the opportunity they represent and how to position to capture this opportunity. The study focuses on the opportunities some five years in the future, rather than simply reporting on the state of the market today.

Changing Competition in Money Purchase Plans (Pensions)

A PEST Analysis (Political-Economic-Social-Technological) of the Pension and group retirement savings market pointed to the forces shaping the market over the next five years and how these forces are likely to change the business. Our report highlighted the major challenges that a plan supplier will face and the strategies needed to succeed in the highly competitive pension market.

Expanding Custody Service to New Markets (Custody & Related)

Mergers among existing custodians often create service disruptions. On behalf of our client we investigated the service opportunities created by mergers and recommended a strategy for entry. With a mid-market focus, we predicted the likely market response to our client and potential revenue.

Packaging Insurance for Small Business Banking (Insurance, Retail)

Starting with survey results, identified the best segmentation of the small business market for sales of insurance products. The strategy looked at packaging products to meet distinct need clusters and combined insurance and lending products in the offer. The study not only identified desirable segments, but also incremental uptake of new products and revenue potential.

Predicting Bank Performance in Treasury Services (Treasury)

Several studies fit under this title. In all cases, we have built models to predict trends in bank positioning and market share. Our models are typically complex multivariate models that begin with bank marketing and service and build to future position by examining how corporate buyers react to bank initiatives.

Investment Trends and Demographic Change (Retail)

The study began by identifying ten major demographic changes from statistical sources and research reports. The impact of these trends on savings and investing was identified by layering primary research onto this trend information. Future trends for retirement and educational savings were the focus of the work.

Predicting Profitability for Commercial Banking Clients (Lending & Related)

This study looked at changes in revenue and breadth of product purchase when sectoral specialists handled commercial accounts rather than generalist account managers. Survey findings were linked to the bank's sales and profitability analysis for each client and product line to determine the effectiveness of specialization. Predicting the benefits from sectoral specialization was the focus of the study.