financialclarity

Product Factsheet

enhancing business performance

MatrixSolutions
A FACTSET Company

For almost 30 years' we've been providing excellent database management to the UKs Financial Sector. Supporting our clients, to enable them to grow their businesses by improving their own sales and distribution strategies.

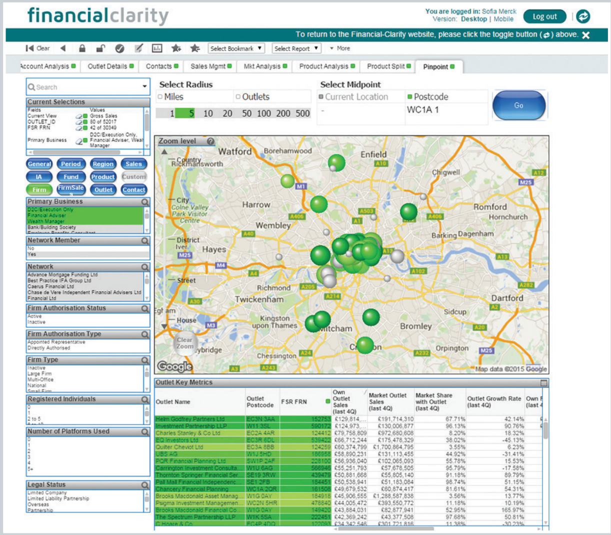
Using this experience and insights we have developed an online 'Financial Intermediary Market Intelligence' hub called Financial Clarity - which combines transactional data from Fund Management Groups, Life and Pension companies and Platforms, with the extensive contact and profile data we hold in our Matrix Financial Intermediary Database (MFID).

So, what is Financial Clarity?

Financial Clarity is a suite of revenue-driving business intelligence tools which has been developed for the financial services industry. It features 3 component parts:

- A secure data hub containing aggregated market sales data from financial product providers and Platforms.
- MFID - the UK's most comprehensive Financial Intermediary database with up-to-the-minute intelligence at individual outlet and contact level.
- A web-based interface which provides simple, intuitive analysis of your own sales, versus aggregated market sales through the Financial Clarity dashboards. The dashboards can be accessed at varying levels of detail to suit the requirements and role of the user.

The dashboards are at the heart of the Financial Clarity offering, so ease of use is paramount. We ensure accessing the latest market data is easy, by using automatically- updated and well laid out graphs, charts and tables.



What benefits does Financial Clarity deliver?

Financial Clarity will help anyone in your organisation to shape revenue-driving sales, marketing and distribution strategies at the level which is appropriate for their role. The information is uniquely generated for every participating company, based on how their own individual sales fit into the overall market. In short it can enable:

Growth through new business

Identify new prospects based on sales volume in a specific product area or sector - enabling you to prioritise your sales and marketing efforts.

Fact finding for new or existing clients

Gain a better understanding of your intermediary clients – Who is growing? What products or sectors they are interested in? What platforms they use combined with details of the firms, who are the branches and key individuals so you can provide them the right assistance.

Monitoring Sales Team Performance

Have an at-a-glance view of your sales and marketing effectiveness – showing growth and key performance indicators, identify trends to input into your strategic reviews.

Monitor Market Trends

See a clear breakdown of the entire market - enabling you to identify and react to any significant changes or trends.

How can it help me sell more products?

The business intelligence Financial Clarity puts at your fingertips help you to make the most of your existing sales infrastructure, enabling you to identify those intermediaries who should or could be selling more of your product, based on the current and historical market landscape. In short, you can:

Transaction views
View transaction values of every asset class sold in every region for a chosen time period.

Secure access
Obtain secure online access to this information on a quarterly (or optionally monthly) basis.

Bespoke dashboards
Arrange your own bespoke sales dashboard to alert you to key sales targets.

Identifying key clients
Identify the fastest growing IFA firms by gross or net sales and track your own changing sales share within those selected firms.

How is Financial Clarity better than any other marketing benchmarking tool?

We collect transactional data from 90% of intermediated sales for the Fund Management, Life Company and Platform market, making Financial Clarity the most accurate benchmarking and analytics tool for the financial sector. You have an overall view of the market and firms, in one place. It gives you all the intelligence behind the market movements, allowing you to make the right strategic decisions to grow your business.

Plus it's the world's first hub to provide this information at outlet level through secure online dashboards, allowing automatic updates with latest market stats. Also, as part of the Financial- Clarity offering you have access to MFID – this is the only complete, accurate and comprehensive database of all FCA-registered UK advisers on the market. In addition, Financial Clarity can be easily integrated into a CRM system. Working with our partner Salesforce we have created Total-Clarity.

Total- Clarity is for those clients that would either like a brand new Salesforce implementation, or for existing users who wish to clean and enhance their existing set-up, all of which can be managed directly by us.

Key Features of Financial Clarity

A simple and secure web-based platform

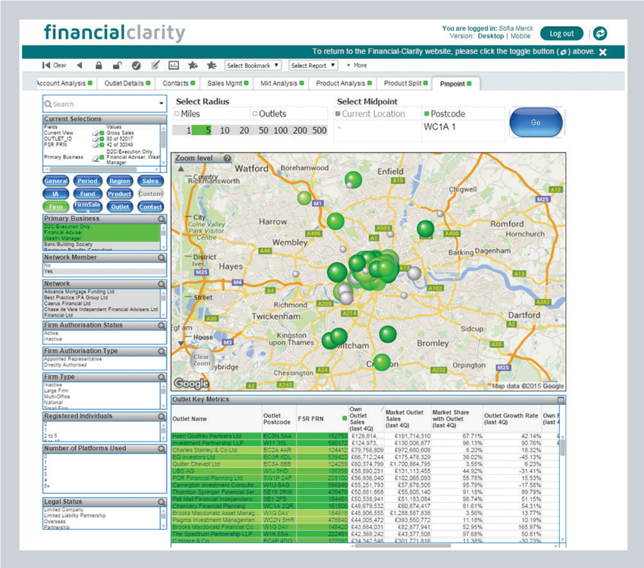
This solution offers a user-friendly interface which sits directly on top of the live data feeds, works in your web browser and requires no extra software, set-up or IT support. The dashboards allow you build information about how the whole sales landscape affecting your product is evolving - valuable results that can be used by anyone within your organisation.

Key Features of Financial Clarity

The Key Customers dashboard

Knowing where to focus your limited time and resources is crucial to maximising performance. The Key Customers dashboard identifies those that should be given your attention. This dashboard can not only identify your largest accounts and largest intermediaries on the market, but it can also identify those that offer the most potential for growth – highlighting intermediaries that are growing quickest or where your share of their sales is below average.

These charts are interactive so you can easily identify different accounts for different products or sale regions, and you can set minimum/maximum revenue ranges to ensure that the intermediaries growth rates/market share are relevant. Having identified your focal accounts, additional information can be extracted though the Account Analysis dashboard for each outlet.



The Pinpoint dashboard

The Pinpoint dashboard

For the sales person on the move, Pinpoint allows you to plan optimum sales visits and identify prospects at a glance. Using a smart-phone or tablet a user can conduct geographical searches for the most relevant intermediary in their chosen area just by clicking on a map.

The results can be displayed based on product type, sales volume and share of wallet. The easy-to-access mapping tools allow you to see exactly which firms in your area match your chosen analysis, and are linked to all their latest contact and business profile information within Financial Clarity.

The Sales Team Performance dashboard

Providing an at-a-glance of who's pulling in the sales and how they compare against each other, the Sales Performance dashboard is simple to use and is updated regularly with the latest figures.

By being automatically generated as part of the wider web-based management information system, these charts are efficiently produced, available at all times and locations, and are consistent with other key performance indicators.

The Sales Team Performance dashboard

By gaining a better understanding of your intermediaries, you can provide them with the right assistance to grow their (and your) sales. The Accounts Analysis dashboard gives an in-depth view of what your intermediaries' are selling, at outlet level or aggregated to a firm level, providing your sales team with the most up-to-date information.

This view shows both your sales versus the wider market sales (through a specific intermediary) broken down by a range of relevant variables – including your own products by product analysis.

Related to the Account Analysis dashboard, are the Outlets and Contacts dashboards. Here you can access other data collected by Matrix, such as regulatory information and individual contact details.

The Profiling and Lead Generation dashboards

Are you targeting the right prospects? Do you know which firms are buying in your sector? The Profiling dashboard has a wide variety of variables that can help identify segments of your sales channel, enabling you to target them with the right marketing message.

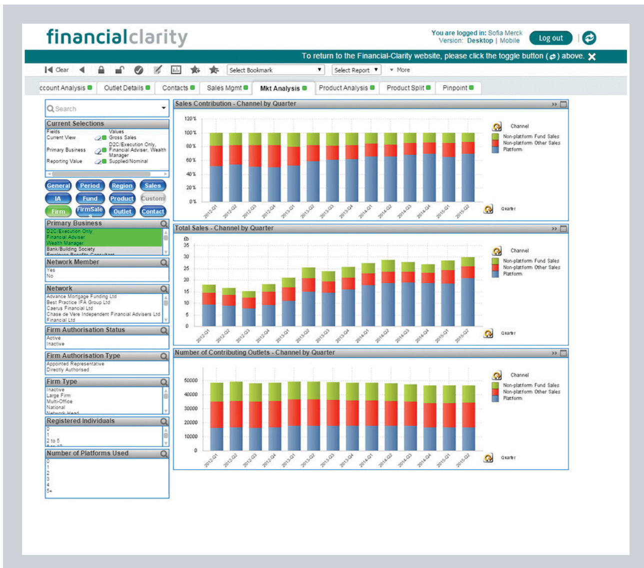
Using the Lead Generation dashboard, you can create a contact list, targeting specific roles within an intermediary (either by controlled function or job title) with email address, telephone number and mailing addresses.

The Corporate Performance dashboard

The Corporate Performance dashboard provides an at-a-glance view of the state of play of your sales. You can see this view at an aggregate level, or broken down into views of specific products, intermediary types, or mapped to your own sales regions.

The charts on the dashboard show sales over time, sales growth relative to the market, changes in market share and how your sales mix differs from the sales mix across the market as a whole - where you are strong, and where you are not. The charts are fully flexible so you are able to change any of the views to suit your analytical or reporting needs.

For example, the switch viewing sales per month, quarter or year is a single click of a button, and it's easy to drill down into specific areas, or even exclude certain sales if needed to provide a clearer picture.



The Profiling and Lead Generation dashboard

The Market Analysis dashboard

The Market Analysis dashboard allows you to look at the performance and the breakdown of the entire market, enabling you to identify and react to any significant changes that are occurring. For example, fast growing or declining products or changes in industry structure as a result of a new regulation can be easily identified.

Market sales figures can be viewed by any combination of product, intermediary type and geographical region to help you get the overall market picture.

The Product Analysis dashboard

The product Analysis dashboard looks at your own sales and is designed for detailed analysis of your own products. The company's portfolio can be analysed for areas of further investment or possible withdrawal. As with the other dashboards, product sales figures can be viewed by any combination of product and intermediary type.

The Market Analysis dashboard

Additional ways to access the data

In addition to the web-based environment (available through your PC or tablet device), Financial Clarity has been designed to be as flexible as possible, you can also choose to have anything from a straight feed of data into your existing business intelligence systems, through to a bespoke design and implementation of a new CRM system.

We will work with you to identify the most appropriate delivery mechanism to ensure you gain the maximum benefit of the intelligence based on your existing distribution setup and objectives.

Bespoke CRM Solutions

As a consulting partner of Salesforce.com, we have qualified personnel in our team who can assist with your current CRM systems, diagnose any problems and develop a solution that will improve your overall business practices.

We can also deploy aggregated market sales data alongside the intelligence we hold in MFID into a brand new CRM system that takes all your existing CRM data and presents it in a way which will most benefit you as a company – we call this a Single Intermediary View (SIV).

Advanced analysis package

To take your analytics further we have developed a statistical analysis system called Matrix FastStats. Key features of FastStats include programmes which can help you identify your most likely profitable prospects, based on their statistical resemblance to your existing customer. You can also plan and execute marketing campaigns that will achieve maximum response rates and overall profitability based on proven and well respected statistical modelling techniques.

All FastStats users are provided with a secure login and guidance on how to use the analytical capabilities to maximum effect. Matrix FastStats can also be extended to include underlying client information as part of a Single Customer View.

Custom data feed

If your organisation has a separate market intelligence or statistical analysis unit, you may benefit more from taking the data feed straight into your current system. We can supply data into statistically-orientated intelligence software such as SAS, SPSS and Hyperion as well as business packages like Business Objects, Cognos or Information Builder. They will already have the technical know-how to optimise the data by building this into their data audits and recommendations for you and we will also be on hand to offer ongoing support and guidance.

Glen Sweet - Head of Sales at Transact

"In the past we have been sceptical about market data aggregators but we are now convinced that Financial Clarity will give us the edge we need to continue growing our market leading position. We look forward to using the transactional data available and profiling a range of new suitable adviser clients that suit our platform.

Financial Clarity delivers clear and up-to-date dashboards of the key sales data my team require, to ensure that we generate continued and sustained growth".

Financial Clarity 55 New Oxford Street London WC1A 1BS T +44 (0)20 704 1200 F +44 (0)20 704 1201

E info@financial-clarity.com W financial-clarity.com