

Custom Research and Consulting

Financial Insights delivers proprietary, expert custom research and advice to financial institutions and solution providers that have specialized research needs. Our consulting professionals have extensive industry knowledge across all segments of financial services and significant project management experience. Project teams are made up of specialized consultants, analysts, and project managers who together bring insight and experience to each engagement.

We help clients develop their business strategies, fine-tune product development and pricing, define and implement go-to-market strategies, and evaluate partnerships and acquisitions. Project teams also draw upon the extensive global resources of IDC to help develop and execute sophisticated primary research surveys, build analysis models, and tap into technology market expertise in nearly 50 countries. Together, we provide clients with custom-designed quantitative and qualitative research and advanced analyses, including conjoint and cluster analysis, that examine market behavior using a variety of tested survey tools, including executive interviews, Web surveys, and focus groups.

Research Project Types

Financial Insights has participated in a variety of engagements for our institutional and vendor clients in the banking, capital markets, insurance, and specialty finance industries. Because each client brings a unique set of business objectives, we develop a specialized project plan for each engagement. Representative project types include:

Go-to-Market Strategies

We provide customer-facing marketing collateral that educates and demonstrates specific value propositions. These outreach efforts include white papers, executive briefs, Webcast presentations, in-person analyst appearances, newsletters, and analyst critiques on client-developed brochures and presentations.

Sales Team Education

We offer training seminars to internal sales teams through a variety of methods, including onsite workshops, Webcast presentations, and prerecorded seminars. We also have developed a series of Financial Services Industry 101 workbooks used as an accompanying tool. These sessions help our clients develop their market-entry strategy by understanding the context, language, and needs of the prospective buyer.

Market Strategy Development

We provide independent, expert counsel on decisions related to entering new geographies, understanding future product demand, developing new product features, assessing local competitors and partners, identifying local market product requirements, and creating market-entry messages.

Market Sizing and Forecasting

Global companies weighing market opportunities use Financial Insights to understand and compare regional and country-level geographic IT spending characteristics, trends, and direction. We also help evaluate competitive market shares. Our clients use this information to make marketing and resource decisions.

ROI Analysis

During a typical sales cycle, institutions now expect an economic-based analysis of the benefits a new technology investment can deliver. We have models that quantify and measure the likely economic impact a new technology will bring to a financial institution.

Representative Custom Research Engagements

Actual custom research projects are as varied as the business challenges our clients face. Past engagements have lasted from two weeks to six months. Financial Insights' singular knowledge of the global financial services industry provides informed, educated, and actionable data and opinions to our clients. Typical consulting engagements have included the following projects:

IT Benchmarking and Best Practices Assessment

We assisted a major global stock exchange in a CEO-level review of its technology strategy. We worked directly with the internal technology arm of the exchange, assessing its internal IT support pricing relative to free-market costs and presented the best-in-class IT strategy practices of peer stock exchanges to the board of directors.

Business Analysis of eCheck Legislation

We conducted a multiclient study of the implications of the Check 21 legislation and how it would affect the business behavior of bankers, billers, and consumers. For this research, we designed and executed two primary studies: a focused series of executive interviews of senior management at banks and core banking outsourcers and a larger survey of 250 billers from a cross section of industries.

Vertical Industry Sales Force Education

We developed an educational training program for a global technology company's newly formed financial services industry sales force. We wrote an introductory training manual, which served as an introduction to the significant business issues facing the banking, insurance, and capital markets industries.

Payments Market Assessment

Engaged by a global software company to help its Internet business group, we surveyed payment behaviors among consumers as well as small and medium-sized businesses in 20 countries. We developed a Web-based consumer survey tailored specifically for each country analyzed, and we captured and assessed critical behavioral and intentional data that our client used to guide its product development and market-entry strategy.

Benefits to Custom Research and Consulting Clients

The extensive knowledge level of our analysts allows Financial Insights to provide clients with specific advice on technology-related strategies and subsequent application direction. In addition to custom research, we offer an array of market intelligence and research products and services to further your market knowledge on a continual basis. Our ongoing subscription services cover retail and corporate banking, capital markets, insurance, and all aspects of risk management. In addition, consulting clients receive:

- EXPERT INDUSTRY ANALYSTS specific to the consulting project
- DEDICATED PROJECT MANAGEMENT for the project duration
- REGIONAL EXPERTISE for the United States, Canada, Latin America, Europe, and Asia/Pacific
- REDUCED ADMISSION to specific Financial Insights or IDC conferences
- COMPLIMENTARY FORUM INVITATIONS (Webcasts, telebriefings, industry briefings)

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Financial Insights provides independent research, custom consulting, and detailed multiclient studies on the technology issues and challenges facing the financial services industry. Our global research covers topics of strategic importance to corporate and retail banks, insurance carriers, asset management firms, and securities and brokerage firms. Our local practices in Asia/Pacific, Europe, Latin America, and Canada add an in-depth regional viewpoint. Financial Insights, an IDC company, is headquartered in Framingham, Massachusetts, USA. IDC is a subsidiary of IDG, the world's leading technology media, research, and events company.