

chartered
developments

OUR BUSINESS IS NEW BUSINESS

Data Research, Lead Generation, Prospect Nurturing
For discretionary fund managers since 1997

A Guide To Lead Generation For Investment Professionals Into IFA's

THE PROCESS



Supply of Data On Prospects, IFA's etc.



Cleaning & Verifying Prospect Data



Gaining Permission



Lead Generation



Ensuring your Sales People are busy

THE CLIENT

An independent global investment manager operating in 10 countries.

Their offering spans investment strategies across equity, absolute return, alternative investments, discretionary portfolio management and tailored investment solutions.

THE BRIEF

- Target Market of 600 IFAs supplied by the client
 - To raise awareness of two primary service offerings
 - Gain ‘with permission’ contact data
 - Arrange meetings
 - Disposition prospects in or out of the pipeline

OUTCOMES

- 6-10 meetings arranged per month for 18 months
- Over 200 prospects into the sales qualified pipeline
- 30 removed entirely from the marketing qualified pipeline

THE CLIENT

A leading global provider of asset management, investment processing, and investment operations solutions for institutional and personal wealth management.

The client assists private banks, investment advisors, investment managers, institutional investors and affluent individuals create and manage wealth.

THE BRIEF

To meet with senior level executives of Top 1000 Investment Intermediary/IFA firms within the UK.

Target decision makers are CEO & FD but not CIO as they may have a vested interest in supporting the existing investment process.

OUTCOMES

- 169 meetings attended in two years
- Significant signings
- 270 removed from the marketing qualified database

Overtime research from the telemarketing effort has hugely influenced changes to the client's proposition.

SUPPLY OF DATA



— Sourcing databases of IFA's & other introducers

RESEARCH & DATA VERIFICATION



— Fortunes can be wasted targeting the wrong practices & the wrong people

THE CLIENT

A large very well known national life and asset management company whose range of products & services includes pensions, life cover, mortgages, insurance & a range of investments.

THE BRIEF

With the potential loss of current clients as a result of the introduction of RDR, our client required the identification and verification of new future prospects. This was carried out by performing in-depth market intelligence on 1200 prospects (IFAs) the data was supplied by our client.

THE RESULTS

Completed Surveys	564
Decision maker stated that RDR is not relevant to their business	240
Declined to take part	156
Did not contact	108
No longer trading	132

The insight gave our client a great deal of collateral for a benchmarking report and PR. Most importantly it gave them a clear database of 473 (within the 564) who became priority prospects. These have become part of a successful lead generation programme.

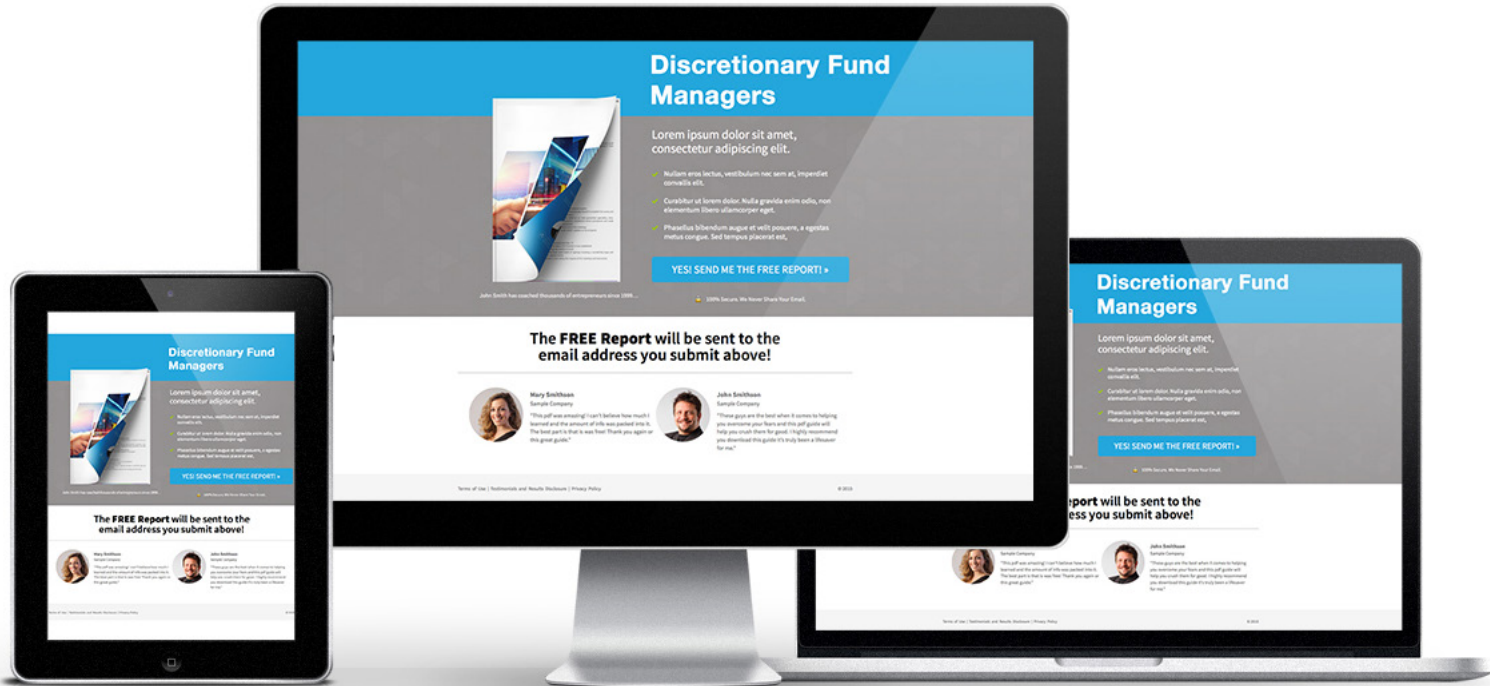
OPTIN & COLLATERAL



The European Parliament will choose the rules on retaining prospect data

If your collateral looks good, & is easy to access, your database can become entirely with permission.

HOW GOOD CAN YOUR EMAILS & LANDING PAGES LOOK?



LEAD GENERATION



LinkedIn



Email



Telephone based

Maximise your business developers face to face time.

BUSY BUSINESS DEVELOPMENT PEOPLE



Your business development people are expensive.
Maximise your teams output by ensuring they are meeting not prospecting

OUR BUSINESS IS NEW BUSINESS

The team at Chartered Developments have been creating leads for the Finance Industry since 1997.

Here is why our clients love us.

- Mature telesales team who act and sound right
- Our data management protocols ensure our clients data is compliant & their managers are busy
- We always deliver

chartered •••••
developments



8 Kew Court, Pynes Hill,
Rydon Lane,
Exeter EX2 5AZ



01392 247200



shaun@chartdev.co.uk