

Overview

GREENWICH ASSOCIATES' CUSTOM RESEARCH unit provides clients with quick, cost-effective research to meet their unique strategic information needs. We leverage our extensive market research experience and access to key financial services decision-makers around the globe to deliver *actionable* information on a variety of topics. Armed with concise, quantitative data and the subsequent recommendations our internationally-renowned consultants provide, your organization will obtain deeper insight into strategic issues facing your business and gain valuable competitive information.



GREENWICH CUSTOM RESEARCH

At Greenwich, Custom Research encompasses:

- *Strategy Formulation*: Understanding the issues that generate opportunities in new products and market segments.
- *Strategy Measurement*: Assessing client satisfaction and the effectiveness of strategic initiatives.
- *Market Trends & Customer Behavior*: Identifying key trends and their impact.
- *Competitive Position*: Assessing market share or product share, including 'share of wallet.'

The CUSTOM RESEARCH unit has a highly-focused mission: develop a thorough understanding of our clients' strategic decision-making needs and then craft a research and consulting study to satisfy them.





SCOPE OF WORK

Greenwich's expansive knowledge of institutional financial markets facilitates a variety of Custom Research projects including:

- Client satisfaction
- Prospect solicitation
- Concept validation
- Competitor benchmarking
- Advertising effectiveness & brand awareness
- e-Commerce
- Operations performance
- User acceptance testing
- Goal congruence

INTERVIEWING CAPABILITIES

A uniquely qualified team of 175 Executive Interviewers establish and maintain long-term relationships with our Research Partners — treasurers, portfolio managers, traders, and other senior financial executives. Consistent access to decision-makers is a unique benefit that Greenwich can provide. Our cadre of interviewers, many of whom are former industry executives, also contribute a wealth of experience to the interviewing process.

Greenwich has recently expanded its capabilities to provide telephone data collection services for larger scale small- and middle-market studies. The firm now owns a subsidiary that operates five fully equipped, modern call centers with 310 computer aided telephone interviewing (CATI) stations — ensuring seamless and timely data delivery. Larger custom projects routinely involve over 5,000 interviews.

DELIVERY

Greenwich assures timely and flexible project execution and delivery. Typical deliveries consist of cross-tabulations, advanced statistical analysis or modeling, and on-site presentation of key findings by consultants who provide industry knowledge and actionable strategies to remain competitive in a rapidly-evolving market. In most cases, additional 'account-by-account' reports with attributed open-ended comments are provided where we receive permission.

For the last 30 years, GREENWICH ASSOCIATES has set the bar in institutional financial research. Based in Greenwich, Connecticut, the Firm is the premier strategic consulting and research source for gaining market intelligence. Each year Greenwich conducts up to 40,000 interviews generating over 100 research-based consulting programs. Greenwich provides accurate, systematic information that meets the global needs of over 250 financial services companies engaged in: *investment management, corporate banking, fixed income, foreign exchange, stockbrokerage, derivatives, and investment banking.*

PROJECT MANAGEMENT

Each Custom Research study is led by a consulting team with extensive market experience. A senior manager spearheads each project, closely monitoring the execution of the study, and is supported by a research associate for data tabulation and analysis. The team works closely with clients at every turn, offering insight and expertise into all aspects of the study — from building a targeted sample and relevant questionnaire to designing an end-product that highlights key findings and *actionable* recommendations.

METHODOLOGY

Greenwich maintains a proprietary database that houses information on over 100,000 buy-side executives, which allows us to create stratified samples to meet our client's needs. We offer clients several options for data collection. Generally, interviews take place in-person or over the telephone — but they can also be conducted by mail, e-mail, or via the internet. We advise clients as to the best research methodology, factoring in cost, timing, respondent bias, and other variables.

FEES

Fees are unique for each project and largely determined by the number of interviews, length and complexity of the questionnaire, type of respondent, data analysis requirement, and methodology. Greenwich can quickly provide fee estimates once these parameters are discussed.

REPRESENTATIVE CLIENT LIST

Greenwich delivers Custom Research to many of the world's leading institutions, including:

- ABN AMRO
- A.G. Edwards
- Commonfund
- Citibank
- CIGNA
- Deutsche Bank
- Daiwa Bank
- European Bank for Reconstruction and Development
- GE Capital
- Goldman Sachs
- First Union
- J.P. Morgan Chase
- Morgan Stanley
- Nordea
- Piper Jaffray
- The Royal Bank of Scotland
- Siemens

CONTACT US

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