

SUITE OF WEB SERVICES 2009

INTRODUCTION

To assist financial services firms in leveraging their Web site to the firm's maximum advantage, DALBAR offers its *Suite of Web Services*.

DALBAR provides financial services firms with a fully customizable engagement that can be tailored in scope and depth to each specific company's need and studies their Web site to identify:

- ✓ The Web site's greatest strengths and weaknesses
- ✓ The Web site's standing as it compares to leading sites and the industry as a whole
- ✓ Detailed recommendations for moving the site toward Excellence and competitive superiority
- ✓ A diagnosis of whether or not the site qualifies for the DALBAR Seal for Communications

USES

DALBAR's *Suite of Web Services* will enable financial services firms to:

- Determine if their Web site is in line with, ahead of, or behind current industry offerings
- Earn public recognition as a Web site that qualifies for the DALBAR Seal
- Set priorities for implementing changes to the Web site.

SCOPE

DALBAR offers *Web Services* for sites in the following industry sectors and the following audiences:

	Consumers	Financial Professionals	Plan Participants	Plan Sponsors
Mutual Fund	√	√		
Variable Annuity	√	√		
Fixed Annuity	√	√		
Retirement			√	√
Brokerage	√			
Life Insurance	√	√		
Disability/Long Term Care Insurance	√	√		
Reinsurance				

DELIVERABLES

Findings from the evaluation will typically be delivered within 6 weeks of DALBAR's receipt of access to the Web site.

DALBAR will provide an electronic report detailing key findings. The report can encompass, depending on the scope of the engagement, any or all of the following:

- A **diagnosis of key Web site features** present/missing
- An evaluation of the Web site's **strengths and weaknesses**
- **Detailed recommendations** for improvements
- **Competitive Industry Benchmarks**: the prevalence of Web site features offered by leading Web sites
- **Best Web Site Practices**: details on innovative, unique, or especially helpful Web site features
- Determination of whether the site qualifies for **DALBAR's Seal for Communication**

COST

The cost structure for DALBAR's *Suite of Web Services* is entirely flexible and allows you to tailor the scope of the engagement based on the level of support you seek.

All costs listed below are for a **single Web site** catering to **one audience** in a **single industry sector**.

MENU COMPONENTS	WHAT IT ENCOMPASSES	COST
(1) PRIMARY WEB SITE EVALUATION	<ul style="list-style-type: none"> ➤ based on features offered/missing ➤ (does the site earn the DALBAR Seal for Communication?) 	\$6,000
RECOMMENDATIONS	<ul style="list-style-type: none"> ➤ Identifies site strengths ➤ Offers recommendations & improvements based on weaknesses observed and prioritizes improvements accordingly 	\$7,500
COMPETITIVE WEB SITE BENCHMARKS	Compares Web Site to <ul style="list-style-type: none"> ➤ Leading industry Web sites ➤ State of the industry overall 	\$5,500
BEST PRACTICES	<ul style="list-style-type: none"> ➤ Describes Best Practices as found on leading web sites 	\$5,000
THE RIGHTS TO USE THE DALBAR SEAL	<ul style="list-style-type: none"> ➤ Valid for one year when the site qualifies for the DALBAR Seal 	\$1,000
ALL COMPONENTS	ALL DELIVERABLES	\$25,000.00

- (1) **The Primary Web site Evaluation is the corner stone and a required component for all other menu options listed above and constitutes the basis for all analysis and reporting.**

NEXT STEPS ...

The following outlines the next steps that will initiate the engagement:

- **STEP ONE:** Define the desired scope and range of the *Suite of Web Services*.
- **STEP TWO:** Central to a formal engagement with DALBAR is defining a measurable ROI (Return On Investment) that your firm hopes to gain from this program. As part of our commitment to our customers, DALBAR is committed to providing a positive and measurable ROI - for every customer, every time.
- **STEP THREE:** Once you decide to participate, DALBAR will mail you an invoice along with an engagement letter that re-states your firm's specific ROI.
- **STEP FOUR:** At the same time, your firm will be asked to provide DALBAR with access to the appropriate Web site or a test account.

DALBAR's Business Technology Division

The mission of DALBAR's Business Technology Division is to produce the maximum return on investment for DALBAR customers' technology expenditures. The division focuses on technology solutions based on:

- ✓ Internet
- ✓ e-Mail
- ✓ Automated voice response based systems

We assist in defining achievable goals, creating a roadmap to achieve these goals using creative solutions, and the broad knowledge of successes and failures of others, providing:

- **Recommendations** designed for the specific firm, audience, needs and objectives.
- **Adoption Strategies** that include optimization of technology and promotion required to maximize adoption rates, using a behavior centric approach.
- **Web Site Rating Programs** regularly publish key findings with regard to technology offerings of financial services firms, offering benchmarking data, spotlighting notable trends, best practices and industry leaders.
- **Best Practices** illustrate effective practices used on leading industry Web sites; based on an expansive catalog of practices gathered over several years of monitoring.
- **Discussion Groups** among financial services firms provide a forum for vetting ideas and developing solutions for common problems.

NOTE: THIS IS A PRODUCT DESCRIPTION THAT IS INTENDED TO ILLUSTRATE A PRODUCT THAT WILL BE DELIVERED TO A SUBSCRIBER. THIS IS NOT A PROPOSAL AND IS SUBJECT TO REVISION WITHOUT NOTICE. UNTIL AN INVOICE IS ISSUED AND PAID, DALBAR IS UNDER NO OBLIGATION TO PRODUCE THE GOODS OR SERVICES AS DESCRIBED HERE.

Please [CONTACT DALBAR](#) for more details.