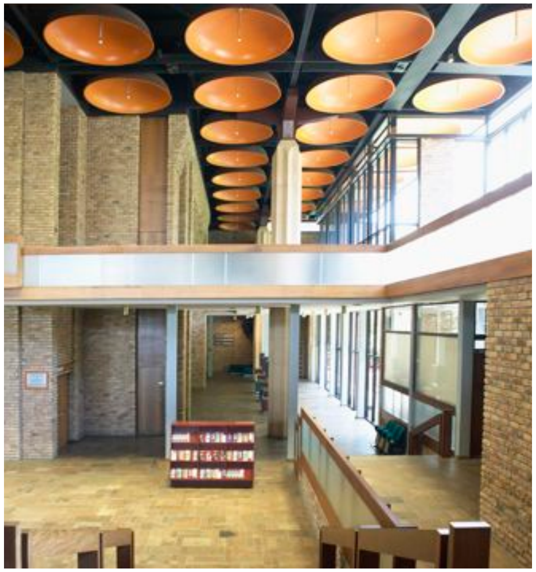
Investment Relationship Management Suite™

Winter 2009 edition

Providing Business and Technology Expertise
to the Investment Management and Financial Services industry

TomtomConsultants
BUSINESS AND TECHNOLOGY EXPERTISE



“The **Investment Relationship Management Suite™** focuses on our industry challenges to add significant business value within weeks”

Business and Technology Expertise

The **Investment Relationship Management Suite™** has been developed specifically for Investment Management and Financial Services firms and is in use at some of the largest Global institutions.

Based upon several years of development and industry specialist knowledge the **Investment Relationship Management Suite™** is suited to:

- Investment Management firms operating in the Institutional, Retail Distribution or Wealth Management markets
- Financial Services companies selling to Global companies, banks and Institutions
- Life and Pensions companies distributing via Intermediaries, partners and Platforms

There are 3 editions – **Institutional and Corporate**, **Retail Distribution** and **Wealth Management** - each tailored to the needs of the Financial Services and Investment markets. They take salesforce.com™ to an industry-specific solution in a few weeks with a full complement of training and documentation to ensure ongoing success.

The core value of the **Investment Relationship Management Suite™** is the ability to store data about firms and companies in a way that reflects the critical structures and relationships of the Financial Services and Investment markets. Without this fundamental understanding of the way the markets operate, traditional CRM solutions are unable to support the core business processes and reporting that Investment Financial Services firms rely upon.

Tomtom Consultants Solutions – your Business and Technology experts

Providing Financial Services firms a simple-to-implement Sales, Marketing & Servicing platform

Based upon proven technology and implementation in just a few weeks, businesses can transform themselves at low cost and minimum risk. The integrated platform and tools add significant value across the business:

	Sales	Marketing	Service
CRM business applications			
Account Management	◆		◆
Opportunity tracking	◆		
Activity Reporting	◆	◆	◆
Industry Segmentation	◆	◆	◆
Campaign Management	◆	◆	
Email Communications	◆	◆	◆
Reporting & Dashboards	◆	◆	◆
Integration and Data Management			
Managed Industry Directories	◆	◆	
Industry News & Data Feeds	◆	◆	◆
Client Reporting			◆
Fund Reporting	◆	◆	
Pitches and Proposals	◆	◆	◆

An business solution delivering value and control

The **Investment Relationship Management Suite™** provides a range of features beyond the standard CRM offering. These features have been developed with the needs of Financial Services in mind, enabling:

> Strategic Account Management; focusing on business-critical relationships
> Sales and Opportunity Management; providing visibility and control
> Client Management; ensuring the highest quality service proposition
> Marketing Automation; maximizing effectiveness through technology
> Integrated platform; bringing together information and tools in a single, simple to use solution for Sales, Marketing and Client Service business areas

Value adding services and benefits

In addition to the core services offered by the **Investment Relationship Management Suite™,** clients can also benefit from the experience and expertise of our industry-leading consultants, technicians and advisers:

> **Business Solution highlights**; as technology evolves and enables new business capabilities, we identify key functionality and industry applications
> **Best practices and approaches**; based on our experience and expertise, our clients gain access to industry-leading quarterly reviews and articles
> **Financial Services CRM network**; with a user community across the Financial Services industry, clients can access contacts from a range of firms

Business and Technology Expertise

www.tomtomconsultants.co.uk

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