

Benefit

This report will give you written documentation of the functions for which internal sales desks in your markets are responsible or not responsible. This will allow you to compare your team to that of other firms that operate in the same markets and decide how you might want to structure your team.

Deliverables

Overall written report organized by market (plan asset size—Q8) so you can compare your team with like-teams most relevant to your firm.

The report will include:

- Executive summary of overall findings and suggested practices for consideration by participating firms
- Question-by-question results organized by market (plan asset size band)
- List of participating firms

Only firms that participate will receive the report of study findings, report is for internal company use only (service provider side), may not be shared with third parties outside the company, no company-by-company findings, no other deliverable from this study.

The questionnaire incorporates suggestions from firms that attended the 2017 annual meeting of the Internal Sales Desk Roundtable . We anticipate that all these firms will participate in the survey.

Participating Firms

The goal is to collect information for 20 to 25 firms, across market, and across industry segment. .

Timing

Final Survey fielded.....September 27, 2017
Deadline for your response.....October 27
Report in your hands by.....November 17

Cost

\$1,900 per firm.

To Participate

To participate, please contact Brian Neligan by phone or email to receive instructions to join the research planning webconference. If you are not able to attend the webconference, please submit your suggestions by email.

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