Client Relationship Manager Position
2016 Compensation Study

7th Edition NEW AND ENHANCED

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Who Stands to Benefit

Heads of Client Relationship Management, Human Resources, Strategy

NEW THIS YEAR

- Exclusive focus on compensation and benefits package (total compensation)
- Detailed analysis of incentive package
- Detailed analysis of rewards and recognition
    - Incentive travel (W2 or non-W2)
    - Awards with an associated cost (non-W2)
    - Awards with negligible associated cost (non-W2)
- Compensation sharing practices
- Involvement in new client installation process
- Time allocation across functions
- Budget accountability (e.g., charge back for overage)
- More information by geographic location (major metro areas)
- Select the way you want compensation rankings from three approaches (geography, total client plan assets, largest client served)
- COMPLIMENTARY: Custom peer group analysis for THREE client relationship managers of your choice

Benchmark for Retirement Plan Service Providers

- ✓ Benchmark for the Client Relationship M anager position across plan sizes
- ✓ Individual relationship manager data
- ✓ Individual relationship manager supervisor data
- ✓ 40 questions addressing compensation, benefits, incentive travel, awards with an associated cost, rewards with no associated cost, budget (travel, training and development, technology), charge back, compensation sharing, and support staff
- ✓ Questionnaire developed with your input and feedback
- ✓ 35 retirement plan service providers invited to contribute
- ✓ 23 past contributors
- ✓ Results available only to participating firms, reports for internal company use only

Deliverables

- ✓ Private presentation / discussion of study results and recommendations for your firm
- ✓ Your choice of compensation rankings approach (geography, total client plan assets, largest client served)
- ✓ Custom peer group reports for three client relationship managers of your choice (additional reports available at cost)
- ✓ Summary report of overall survey results
- ✓ Report summarizing individual client relationship data collected
- ✓ Coded firm-by-firm report

Schedule

Draft questionnaire / data submission form .... November 20, 2015

Planning conference call .... December 9, 2015

Final survey questionnaire / data submission form .... December 18, 2015

Survey fielded .... January 11, 2016

Respond by.. March 4, 2016

Overall reports .... April 15, 2016

Firm-by-firm report.. April 29, 2016

Private Interactive Web conferences .... May 16-27, 2016

Custom peer groups.. June 17, 2016

Great Value

Sign up before November 30, 2015, pre-purchase in 2015, and
submit data on or before March 4, 2016.. $3,750

Sign up after November 30, 2015, and submit data on or before March 4, 2016 .... $4,625

Sign up after November 30, 2015 and submit data after March 4, 2016............................. $5,750

To Participate

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