

Financial Services & Insurance

Building Growth and Sustainable Competitive Advantage

At Fletcher/CSI, our focus is on helping our Financial Services & Insurance Industry clients grow their businesses while creating sustainable competitive advantage. Recognizing that turbulent market conditions make building business strategy especially difficult, we help our clients sift through their churning, competitive environments to uncover gems of opportunity that can not only help them ride the waves of change, but also position them as industry leaders now and in the foreseeable future.

Creating growth opportunities and building sustainable competitive advantage is all about knowing your company, your customers, your competitors and the external environment. It is about sifting through this knowledge and finding the opportunities to establish superior differentiation, the kind that have substantial tangible and intangible value.

Our team explores your customers' experience with your firm from their first awareness of your brand to the ultimate delivery of products and services, and then on to the renewal of the relationship. We look for opportunities to advance your efforts in sales, marketing, product and market development, technology, and service delivery. We bring a wealth of financial services industry experience and best practice approaches from top industry performers, both from within your industry and from other major industry segments.

We combine our more than two decades of consulting experience with a full diagnosis of your environment and a thorough review of the business intelligence so as to prescribe the right strategies, tools, and implementation plans that will help you to create substantial business growth opportunities and sustainable competitive advantage.

Engagements can include brief topical studies and consultancy to longer-term, retainer-managed engagements.

Industry Expertise Includes:

Financial Services

- Asset Management
- BPO/Data Providers
- Commercial Finance
- Credit Cards/Payments
- Retail and Wholesale Banking
- Specialty Financial Products
- Stock and Commodities Exchanges
- Wealth Management and Securities Distribution

Insurance Industry

- Commercial and Personal Lines
- Life, Health, and Disability Lines
- Third Party Claims Administration
- Self-Insurance and Reinsurance
- Supplemental Coverage Lines

Consulting Disciplines Include:

Go-to-Market Strategy

- Competitive Analysis
- Distribution Channel Delivery
- Market and Product Development
- Value Creation

Sales & Marketing

- Competitor Analysis
- Marketing Communications and Strategy
- Purchase-Decision Mapping
- Sales Enablement
- Value Proposition Alignment

Customer Experience

- Customer Service
- Distribution Channels
- Information Technology
- New Client Orientation
- Renewal Processes



FLETCHER/CSI®

Simple, Powerful, Insightful Intelligence

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