

ParkereSSe Ltd.



STATE OF THE RETIREMENT INDUSTRY ADDRESS

A View From The Back Office

DOES YOUR BACK OFFICE FEEL LIKE...



DOES YOUR BACK OFFICE FEEL LIKE...

No one to help; direction unclear and treacherous



DOES YOUR BACK OFFICE FEEL LIKE...



DOES YOUR BACK OFFICE FEEL LIKE...

Always in a race; getting in each other's way



DOES YOUR BACK OFFICE FEEL LIKE...



DOES YOUR BACK OFFICE FEEL LIKE...

Turbulent times; struggling to keep above water



The Debate Over the Back Office

Statement: The Back Office Can Be Cost-Effective and a Key Element of Client Satisfaction

Arguments will be heard from:

- The Dissenting View: “Fed-Up”
- The Affirmative View: “ParkereSSe”

The Debate Over the Back Office

Issue #1: Can there be Improvement?

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Argument From : “Fed-Up”

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- Our core competencies are not effective in yielding measurable results

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Reaction From : “ParkereSSe”

- We have agreement! Core competencies in investment, sales, and CRM are not sufficient.

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Response From : “ParkereSSe”

- The Back Office is an Engineering Problem and demands an Engineering Solution.
- You must apply Technical and Operations expertise
- The Back Office will become Value-Added and KAOS will be transformed into CONTROL

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Issue # 2: Can there be ROI?

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Reaction From : “ParkereSSe”

- Translation: Give Up! . . . WE SAY NEVER!!!

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Response From : “ParkereSSe”

- Grab low hanging fruit for short term gain. They are there and can be found with a fresh vision.
- But don't stop there. The big rewards are later. Develop a progressive plan for mid- and long-term that balances need and budget.
- The ROI will come with higher Client Satisfaction which will positively impact Client Retention and Positive Recommendations/Surveys (TRANSLATION: NEW SALES!!!)

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Issue # 3: Can Executives Understand the Back Office?

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Argument From : “Fed-Up”

- Executives only understand Summaries and Bottom Lines
- To understand Back Office, you have to get in the weeds.
- The Back Office is always on the Expense side of the Bottom Line and Execs FULLY UNDERSTAND WHAT THAT MEANS!

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Reaction From : “ParkereSSe”

- To Restate: Execs aren't equipped to run their own business. NOW THAT'S A BOTTOM LINE I WOULD AVOID!!!

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Response From : “ParkereSSe”

- Execs understand that a better business fit results in more effective, efficient and higher quality operations.
- And Execs know that the real bottom line is the NET RESULT.
- And they know that Client Satisfaction produces increased retention and sales which will push the NET RESULT Upward.

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Issue # 4: Can Sales Benefit?

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Argument From : “Fed-Up”

- Sales is: untapped markets, needles in the haystack. In short, it is a lonely process that builds from the ground up.
- Sales doesn't care how it gets done. And neither do Prospects. They just need to know you can do it.
- Just define the product and push Sales out the door.

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Reaction From : “ParkereSSe”

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Response From : “ParkereSSe”

- Why is this an “Old” Adage. BECAUSE IT HAS STOOD THE TEST OF TIME and proven to be an undeniable truth!
- You reap what you sow. Satisfy your clients and they will satisfy you.
- And nothing satisfies like responsive, high-quality products and services from your back office.

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RESULTS:

- “Fed-Up” is NOT a permanent condition!
- There is much to gain from a fresh and insightful perspective.
- “ParkereSSe” has the vision, experience, and expertise to change “Fed-Up” to “Can-Do”!

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Conclusion: ACT NOW

- Schedule a short meeting (Why not now at the show?) to tell us a little about your back office....and we will provide an evaluation and recommendations.
- Or let's schedule a conference call with your team and if warranted discuss a site visit!
- Let's grab the low hanging fruit and the "Can Do" spirit.

ParkereSSe Ltd.



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