

# DATA ANALYTICS FOR RETIREMENT PLAN PROVIDERS

Perspective

## COMPANY OVERVIEW

### Financial Services

North Highland helps Financial Services clients including 17 of the top 25 global financial institutions to meet the challenges of volatile world economies with custom solutions that:

- Manage risk
- Respond to new regulations
- Improve operational efficiency and return on equity
- Identify emerging customer needs
- Create a more engaged workforce

## ONE RELATIONSHIP. MANY SERVICES

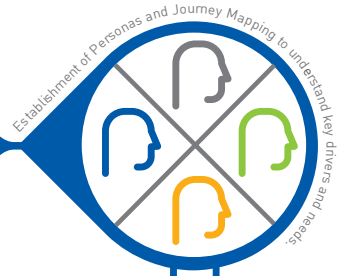
Once a client of North Highland, you tap into our complete network of talent and resources. From our worldwide consulting practice of 2,600+ professionals to our branded divisions offering comprehensive business intelligence, marketing, managed services and staffing resources, you are never far from the expertise and support you need to succeed.



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**BIG DATA ANALYTICS + CYBER GRAPHICS**

How are we thinking?	INTERNAL FOCUS			EXTERNAL FOCUS	
	1970s	1980s	1990s	2000s	2010s
Who is the customer?	Plan sponsor is the customer.			Plan sponsor, participant and consultant are all customers.	
	Industry	Participant life stage	Participant behavior style (e.g., doers, delegators, self-directed)	Segments from other industries	External data
Primary Segmentation Factors		Plan level		Cost and regulatory pressures	Assets not necessarily primary
Segmentation informed by:	Plan Demographics		Participant Demographics	Cybergraphics (including social media)	



Corroborate segmentation today, possibly inform it in the future.

- BENEFITS**
- Better data access.
  - Easier data manipulation/interpretation.
  - Deeper customer knowledge.
  - More powerful decision support.



**KEY TAKEAWAYS**

**New customer segmentation trends can help RPPS leaders:**

- Better address customers' needs and empower them to make good decisions.
- Rebuild and strengthen consumer trust as advocates and thought leaders.
- Demonstrate genuine connection to the concerns of customers and their consumers.
- Get ahead of the data analytics trend and demonstrate its value to other financial services institutions.

- Better understand and respond to customers at every level.
- Engage customers with more sophisticated scripting.
- Transform products for specific customer segments.
- Shift from more products to better targeted ones.

**THIS HELPS YOU**

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## ABOUT NORTH HIGHLAND

North Highland is a global management consulting firm that delivers unique value, relevant big ideas and strategic business capabilities to clients around the world. The firm solves complex business problems for clients in multiple industries through an integrated approach and offers specialty services via its Data and Analytics, Managed Services, and Sparks Grove divisions. North Highland is an employee-owned firm that has been named as a “Best Firm to Work For” every year since 2007 by Consulting Magazine. The firm is a member of Cordence Worldwide ([www.cordenceworldwide.com](http://www.cordenceworldwide.com)), a global management consulting alliance. For more information, visit [northhighland.com](http://northhighland.com) and connect with us on [LinkedIn](#), [Twitter](#) and [Facebook](#).