

# Aligning an Organization for Platform Sales Success

*A Holistic Examination of Investment-Only Distribution*



## Study Chapters:

1. Assessing the Opportunity in Platform Markets
2. Aligning an Organization for Platform Distribution
3. Staffing a Platform Distribution Effort
4. Trends in Platform Sales Force Compensation
5. Platform Sales and Marketing Strategy
6. Platform Business Profitability
7. Platform Business Outlook

**Price: \$7,500**

**Table of Contents, List of Exhibits, and Order Form attached.**

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## Overview

This first-ever holistic examination of platform distribution details the transformation of asset management organizations and product lines in response to the dramatic growth of investment-only sales and assets. Based on a survey of leading asset managers and scores of interviews and discussions within platform sales executives, this study encompasses the IODC, Insurance, Sub-advisory, SMA, Mutual Fund Wrap, and 529 Plan markets.

## Benefits

- Integrate platform sales and marketing functions
- Demonstrate the need for additional sales staff
- Refine sales force compensation levels and components
- Improve sales force production levels
- Measure platform business profitability

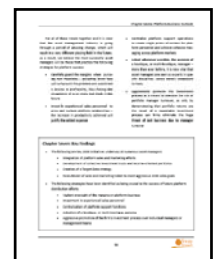
## Key Findings

- IODC and mutual fund wrap are the fastest growing platform markets on a sales-to-assets basis
- Firms have an average of 55 employees dedicated to platform business, 60% of which are in sales and key account roles
- IODC offers the highest margins of any platform market, while the SMA business offers the lowest
- The battle for experienced sales personnel is escalating and driving up the cost of recruitment and compensation
- Platform distribution is fueling the development of best-of-breed platforms

## Essential Benchmarks

- Average profit margins earned on platform business across markets
- Gross sales-to-asset ratios for platform markets
- Headcounts for platform personnel across a variety of functions
- Compensation levels and components for platform sales personnel
- Sales and assets per external salesperson and key account manager
- Sample organizational structures

## Sample Report Pages



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# Table of Contents

<i>Key Findings</i> .....	1
<i>Foreword and Methodology</i> .....	3
<i>Executive Summary</i> .....	5
<i>Chapter One</i>	
<b>Assessing the Opportunity in Platform Markets</b> .....	15
I. Dispersion of Assets Across Markets .....	15
II. Platform Sales by Market.....	17
III. Key Platform Targets in 2008.....	18
<i>Chapter Two</i>	
<b>Aligning an Organization for Platform Distribution</b> .....	21
I. Developing a Best-of-Breed Lineup.....	21
II. Strategies for Structuring a Platform Distribution Effort.....	22
<i>Chapter Three</i>	
<b>Staffing a Platform Distribution Effort</b> .....	29
I. Staff Designations and Headcounts .....	29
II. Key Sales Force Benchmarks.....	31
<i>Chapter Four</i>	
<b>Trends in Platform Sales Force Compensation</b> .....	35
I. Compensation Totals and Components .....	35
II. Paying Retail Sales Personnel for Platform Business .....	39
<i>Chapter Five</i>	
<b>Platform Sales and Marketing Strategy</b> .....	41
I. Gaining Platform Mandates .....	41
II. In-Demand Product Structures and Asset Classes .....	45
III. Value-Add Marketing Programs.....	47

*Chapter Six*

**Platform Business Profitability** ..... 49

- I. Pressure on Management Fees ..... 49
- II. Pressure on Platform Fees ..... 51
- III. Profitability of Platform Markets..... 52

*Chapter Seven*

**Platform Business Outlook** ..... 55

- I. Key Challenges in 2008 ..... 55
- II. Strategies for Future Platform Success ..... 58

**Appendices**

*Platform Strategy Survey*..... 61

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# Directory of Exhibits

Exhibit 1-1: Participation in Platform Markets .....	15
Exhibit 1-2: Assets Under Management by Platform Market .....	16
Exhibit 1-3: Gross Sales by Platform Market .....	17
Exhibit 1-4: Gross Sales to Assets by Platform Market .....	17
Exhibit 1-5: Importance of Platform Markets to 2008 Strategic Plans.....	18
Exhibit 2-1: Creating a Best-of-Breed Lineup .....	22
Exhibit 2-2: Consolidation of Platform Businesses Under a Retail Unit .....	23
Exhibit 2-3: Separate Investment-Only Unit: Basic Model .....	24
Exhibit 2-4: Separate Investment-Only Unit: Complex Model .....	24
Exhibit 2-5: Position of Platform Businesses Within the Organization .....	25
Exhibit 2-6: IODC Gross Sales by Plan Size.....	25
Exhibit 2-7: Centralized Platform Support Functions .....	26
Exhibit 2-8: Advanced Model: Separate IO Unit With Centralized Support Functions .....	27
Exhibit 3-1: Sales Personnel Certifications and Designations .....	29
Exhibit 3-2: Platform Staff Headcounts by Function .....	30
Exhibit 3-3: Ratio of External to Internal Salespeople by Platform Market .....	31
Exhibit 3-4: Sales Force Headcount by Platform Market .....	31
Exhibit 3-5: Platform Market AUM and 2007 Gross Sales per Key Account Manager .....	32
Exhibit 3-6: Platform Market AUM and 2007 Gross Sales per External Salesperson .....	33
Exhibit 4-1: Sales Force Compensation by Position.....	35
Exhibit 4-2: Variance in Compensation Across Platform Markets.....	36
Exhibit 4-3: External Sales Compensation Structure .....	36
Exhibit 4-4: Internal Sales Compensation Structure.....	37
Exhibit 4-5: System for Calculating a Sales-Based Bonus .....	38
Exhibit 4-6: Key Account Manager Compensation Structure .....	38
Exhibit 4-7: Consultant Relations Compensation Structure .....	39
Exhibit 4-8: Paying Retail Mutual Fund Wholesalers on Platform Sales .....	40

Exhibit 5-1: Identifying the Decision-Maker ..... 41

Exhibit 5-2: Decision-Makers by Platform Market..... 42

Exhibit 5-3: Importance of Firm and Portfolio Attributes to Earning Platform Placement ..... 43

Exhibit 5-4: Negative Attributes Leading to Lost Platform Mandates ..... 44

Exhibit 5-5: Share Classes and Product Structures Used for Platform Business..... 45

Exhibit 5-6: Asset Classes in High Demand by Platform Gatekeepers ..... 47

Exhibit 5-7: Rating the Importance of Value-Add Programs..... 48

Exhibit 6-1: Fee Pressure Across Platform Markets..... 50

Exhibit 6-2: Average Profit Margins Across Platform Markets ..... 52

Exhibit 6-3: Platform Expenses by Category ..... 53

Exhibit 7-1: Importance of Product and Marketing Initiatives to 2008 Plans..... 55

Exhibit 7-2: Level of Integration Within Platform Support Functions ..... 56

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