

Financial Insights Bullet Proofing Sessions

Financial Insights Bullet Proofing sessions offer dedicated analyst input to test positioning and messaging before you go-to-market. These interactive, hands-on sessions help you deliver a more successful public launch of your corporate strategy, product, service or other initiative. Financial Insights' analysts will review your presentation and then provide a critique of the presentation and evaluate:

- Soundness of strategy
- Accuracy of information presented
- Delivery of message
- Uniqueness of message

Benefits

- Bullet Proofing helps prevent you from making costly mistakes by identifying possible weaknesses before the public launch of your initiative
- Analyst input strengthens your message and delivery
- Outside viewpoint gives you a new perspective to fine tune your strategy
- Financial Insights data and analysis provide valuable context for the discussion

Sample Bullet Proofing Agenda

1. Kick off with introductions and agenda review: 15 minutes
2. Analyst presents on market issues related to the bullet proofing subject: 1 hour
 - Scope of Marketplace (context of financial services and segment area)
 - Key Trends and Market Opportunities
 - Drivers and Inhibitors
 - Competitive Considerations
 - Recommendations
 - Q&A
3. Break: 15 minutes
4. You present your intended strategy and messaging: 1 hour
5. Analyst reviews/critiques/comments on strategy and messaging and provides additional relevant information: 1 hour
6. Lunch: 45 minutes
7. A roundtable discussion to identify ways to strengthen strategy and messaging: 1 hour
8. Wrap up with analyst summary of recommendations: 45 minutes

Notes: Bullet Proofing session topics will be identified prior to the session. An Financial Insights project manager will coordinate session dates and pre-session calls as needed.