

## Implementation & Services Assessment Tool (iSAT™)

Defined Contributions (DC) Implementation & Services



BOSTON RESEARCH TECHNOLOGIES

Client services and support make up a key component of DC Plan sales and client loyalty management. The **Define Contribution Implementation & Services Assessment Tool (iSAT™)** is designed to help DC recordkeepers carefully manage client feedback (satisfaction & loyalty) on new plan implementations and services that they provide to their clients. This cost-effective on-line tool provides a highly impactful and robust “real-time” client feedback tracking mechanism enabling firms to monitor, manage and enhance their customer service capabilities in delivering and supporting world class DC plans and services. The tool includes industry level performance benchmarks for comparison and is currently used by some of the world's largest firms.

### Our Turnkey Solution

#### Listen

- **Turnkey automated feedback loop** – Automated “continuous” surveys on new clients and/or specified plans.
- **Easily tailored online surveys** – Online surveys customizable to needs.
- **Feedback loop** – Feedback directly to specified individuals with layered access permissions.

#### Diagnose

- **Flexible Reporting** – On Demand and scheduled online reporting.
- **Diagnostic Dashboards** – Management & Executive Dashboards - Drill down to specific area and root cause.

#### Manage & Act

- **Alerting** – Email and text alerting systems address issues before they become issues.
- **Integration Compatibility** – Closed loop reporting (can be integrated with existing CRM system).
- **Tiered Security** – Multi-level permissions and administrative capability.

### Our Differentiators

- Easy turn-key implementation.
- High-level of customer support.
- Over 4 decades of expertise in the DC industry.
- Behavioral sciences (behavioral finance) pedigree.

### Value

**Build Loyalty** – Build ongoing dialogue and connection with client.

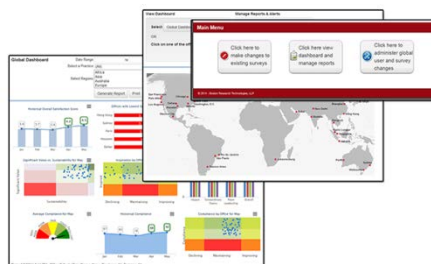
**Monitor/Enhance Client Services** – Monitor, manage and drive accountability/growth in client services.

**Risk Management** – Identify early warning signs and minimize defection.

**Continuous Improvement** – Evaluate real-time changes in customer needs/experiences and evolve business services.

**Industry benchmarks**– Compare your performance to that of the broader DC industry.

**Cost effective** – Our solution is highly cost-effective unlike other solutions, while also driving ROI that significantly outweighs the cost.



Contact us for a demo or to discuss your specific needs.

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