

An illustration on a teal background shows a black silhouette of a person standing and holding a green rectangular board with both hands. The board is covered with a pattern of white birds in flight. Several white birds are also shown flying away from the board into the teal background.

ESITHOUGHTLAB

Tailoring thought leadership

Finding the best ways to engage an executive audience



Creating distinctive content

White papers. Think pieces. 5-minute briefings. Blogs. Case studies. Infographics. Charticals. Slide decks. eBooks. Videos. Animated videos. Data visualization tools. Data navigators. Interactive infographics. Benchmarking tools. Decision-support microsites.

White paper

We can work with you to take a deeper dive into the survey and research data with a **15–20 page white paper** drawn from our survey results and interviews. The paper will cover a topic of your choice that focuses on a particular aspect of the survey results. The report will include the following elements:

- **An executive summary** highlighting key findings.
- **In-depth interviews** with 5-6 of your executives and/or clients.
- **Case studies** from 3-4 of your clients.
- **Engaging charts and tables** to illustrate the key points of the research.
- **Calls to action** to help readers plan their future.

We will work closely with you to develop a compelling narrative for the report, including a working hypothesis and detailed outline. The final report will be delivered in Word for your design and branding, or ours.



Last year, we created a tailored white paper for Broadridge by drawing on millennials' responses to our survey.

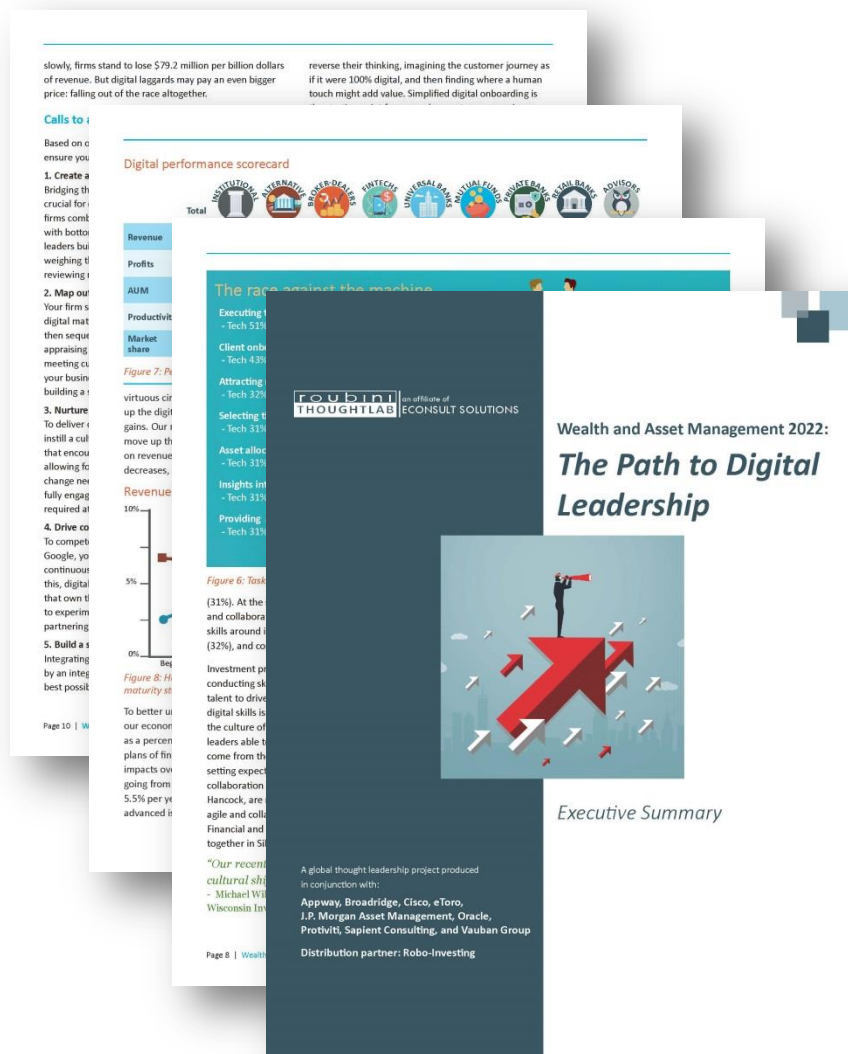
Briefing paper or executive summary

Rather than a white paper, we can produce a briefing paper that focuses on higher-level findings on your preferred topic. This paper will be **7–10 pages in length** and include the following elements:

- **In-depth interviews** with 3-5 of your executives and clients.
- **Case studies** of 1-2 of your clients.
- **Engaging charts and tables** to illustrate the key points of the research
- **Calls to action** to help readers plan their future strategies.

Alternatively, we can prepare a 5-7 page executive summary based just on the survey results and calls to action, without additional interviews or case studies.

We will work closely with your firm to develop a compelling narrative for either type of report, including a working hypothesis and detailed outline. The final report will be delivered in Word, for your design and branding, or ours.



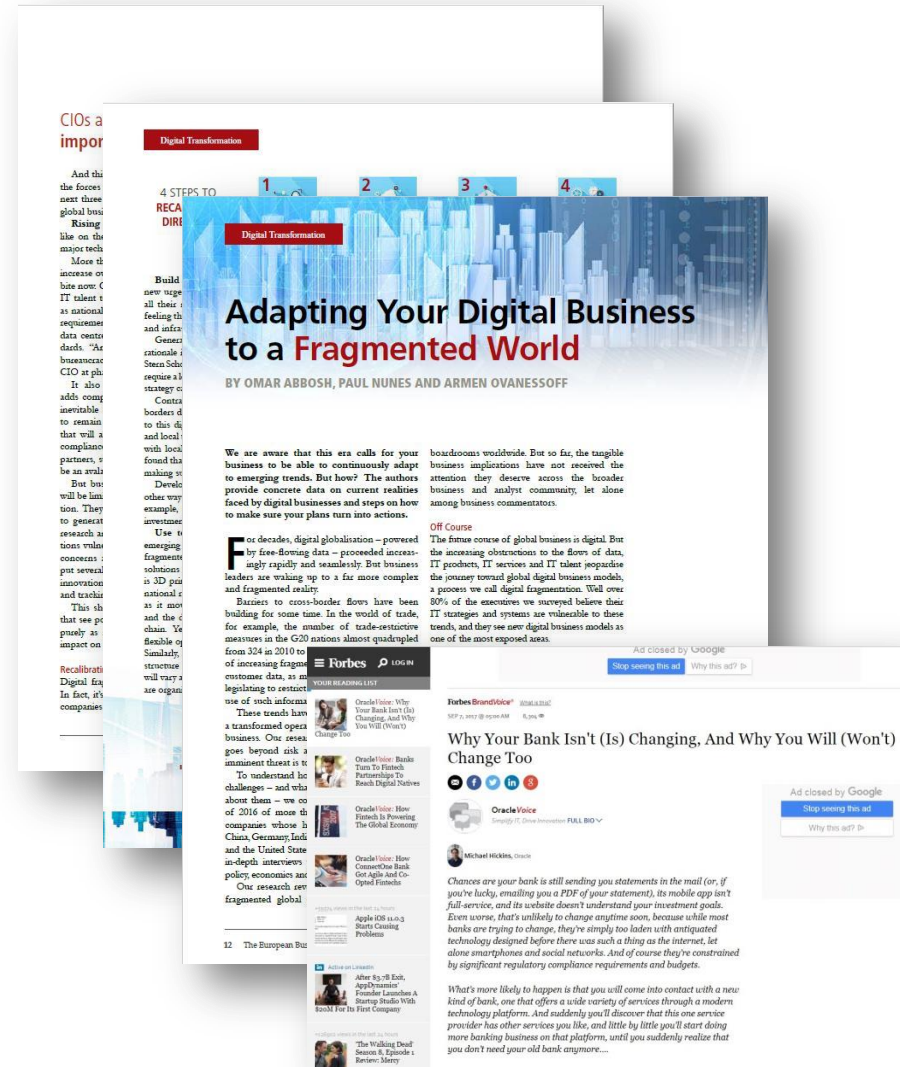
Think pieces or 5-minute briefing

For today's busy executive, ThoughtLab can produce a think piece, or series of think pieces, each about **2-3 pages in length**. Each of these articles will focus on one key trend emerging from the research, and will include the following elements:

- **Quotes** from our interviews for the paper
- **Corporate vignettes** drawn from the case studies
- **Engaging charts and tables** to illustrate relevant survey findings

We will choose the topics in consultation with you and base them on an agreed-upon storyline.

Alternatively, we can create very short “five-minute” executive briefings, again 2-3 pages in length, which provide a high-level overview of our key findings and critical calls to action.



Blogs and social media

ThoughtLab can produce **300-500-word blogs** based on the research with graphs and illustrations ready to publish on your firm's platform.

In addition, we can prepare social media tiles that provide an attention-grabbing graphic and one-line explanation.

We are also able to push out content through multiple channels, including our company's websites and social media pages.

The collage displays various digital assets created by ThoughtLab:

- Cashless Cities:** A report cover titled "Cashless Cities: Realizing the Benefits of Digital Payments" featuring a city skyline at night.
- Econsult Solutions Blog:** A blog post titled "ANNOUNCING A ROADMAP TO DIGITAL READINESS FOR INVESTMENT PROVIDERS" with a green header and a "Storify" link.
- Cisco Blogs:** A blog post by Danny Vicente, Market Manager, Financial Services, titled "Cashing Out". The post discusses the challenges of cashless cities and the benefits of digital payments.
- Twitter:** A tweet from Roubini ThoughtLab (@rthoughtlab) announcing a new study on the #DigitalTransformation of the #WealthManagement industry.
- Latest Rewards:** A section titled "Latest Rewards" showing a list of rewards and a "Join Today" button.

Case studies

To showcase best practices and provide real-world examples of how executives are thinking about the future, ThoughtLab can create a series of standalone case studies based upon interviews that we have already conducted—or new ones that we can organize on your behalf.

These case studies will highlight key takeaways from the research and illuminate leading-edge thinking and innovative strategies. We will work closely with your firm to choose the appropriate organizations for these case studies.

ESI ThoughtLab can draw on its respected brand and deep rolodex of executive contacts to conduct these interviews.

How Putnam uses technology to drive value

With \$165 billion under management, Putnam Investments has practiced an active approach to investment since its first fund was established in 1928. Today, Putnam's approach is more direct than ever, using technology to drive value.

BBVA: Taking a hybrid approach

BBVA believes that its wealth management customers should be able to get the best advice without needing to walk into a branch. Its "hybrid" model combining high-tech and high-touch uses "remote" managers that sit in back offices in its branches around Spain, interacting with customers via mobile apps, online chats and video conferences, earning it the top spot in the 2017 Forrester Global Mobile Banking Benchmark.

New digitally enabled tool

Once onboarded using BBVA's automated two-minute process, a customer can use its mobile app to call "a manager, who knows who is talking," says Gonzalo Rodríguez. The bank also has a "secure wall" behind which customers can exchange documents with the manager and sign on their mobiles. "You get the best of the technology, because you have convenience of doing everything from your mobile phone, but at the same time, you get the best human advice because you're actually talking to a manager." While most interactions are remote, customers can set up an appointment through the app to meet managers in person.

Differentiating through pro

Putnam is seeking fresh ways five years, we want to continue to grow. We know we can add value for our clients. One such area is ESG (Environmental, Social and Governance) funds.

Reynolds is quick to point out that new ideas are not just aimed at younger generations. "We're 89 years old, and she texts me on her iPhone. Technology is extremely important to the population. As you get older, you get more advice and technology becomes more important."

Wealthfront: Serving a digital-only generation

Andy Rachleff, CEO of pioneering fintech Wealthfront, believes in-person interaction will be a thing of the past for the next generation. Some 85% of his firm's customers are under 45 years old. "Our clients tell us, 'We pay you not to talk to us,'" he says. "If you are around my age, 58, you might laugh when I say that. If you are 32, you would nod your head."

He contrasts the behavior of "baby boomers" like himself—the target customers for most incumbent wealth firms—with that of his millennial clients. "My generation likes talking to people. If I have a problem, I'm going to seek out the help of an expert and I literally want to sit down and talk to that person," says Rachleff. "My children, who are 22 and 25, are the exact opposite: They prefer doing everything electronically and actually avoid having to talk to people. Like all of their friends, they have turned the ringers off on their telephones—if I want to talk to my kids, I have to text them to call me."

Wealthfront is the only robo-advisor that is digital only, because "we're the only firm focused solely on people in their 30s and 40s," says Rachleff. "Others are trying to put a foot in both camps. You will find if you actually drill down on the numbers, though, that they're not very successful at getting new clients, particularly those under 45."

Rachleff says most incumbent firms expect today's young investors to "come to their senses" when they get older and richer, and realize that they need to talk to someone. "I think that's equivalent of saying to someone who grows up listening to rock music, 'when you turn 50, you'll listen to symphony.'"

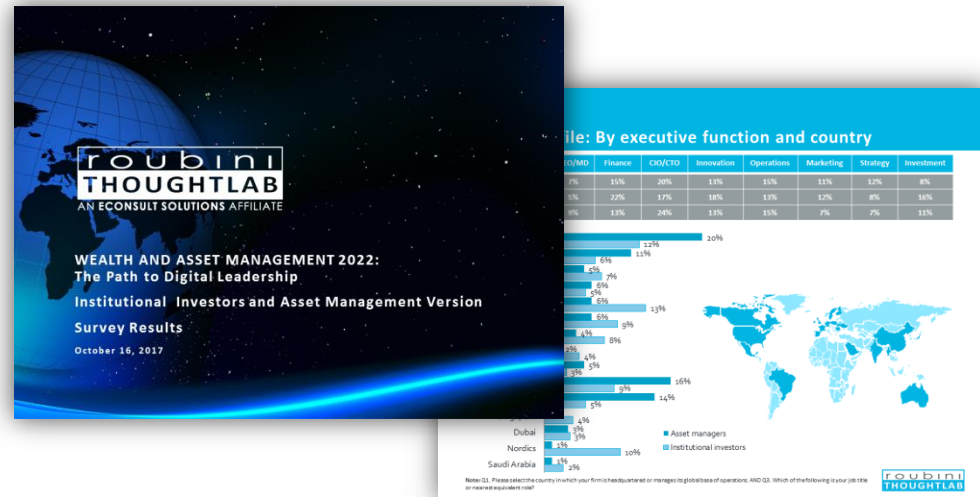


Slide decks

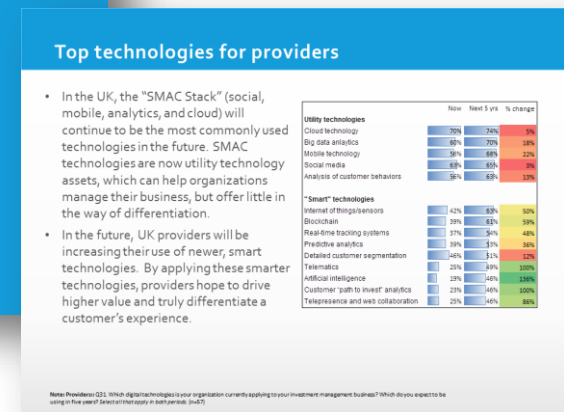
ThoughtLab can develop a PowerPoint **slide deck** for use in client presentations or at conferences and meetings.

The deck would cover your preferred deep-dive topic, summarizing and illustrating the relevant research results using charts, tables, and infographics. It can also include key quotes from interviews.

We will work closely with your firm to develop the storyline for the deck and ensure it has your firm's branding.



Summary of UK results



Interactive POV and eBooks

Instead of a white paper, ThoughtLab can present the research findings in the form of an **e-book**, a web-enabled report that provides readers with **easy point-and-click access to key insights**.

An eBook is a highly graphical format – essentially a white paper as a hyperlinked presentation. The report includes a navigation bar that allows the reader to click directly to the area of interest.

As a web-native document, an eBook can also hyperlink to externally published material to enrich the reader's experience.



Review Accenture's Interactive POV eBook

Videos and animated videos

We can work with you to produce **videos highlighting the research** through discussions with your executives or our experts. These videos can focus on one or two key findings or major themes from the research and include graphical elements from the paper showing relevant statistics and analysis from our survey.

Videos are generally 1–2 minutes in length. Your firm can choose executives for interviews, approve the script, and choose the appropriate look and feel. We also work with award winning television producers who can produce more elaborate videos with visuals and music. Our team can also create animated videos that tell a story by the use of a stream of pictures and frames.



[Click here to see Cognizant's video](#)



[Click here to see the Wealth 2022 video](#)

Infographics and charticles

To accompany the reports, we can produce a series of **infographics or charticles** that provide quick, engaging snapshots of our research and encourage readers to investigate further.

We can produce **at-a-glance infographics** that tell a story graphically. These infographics can be static or produced in interactive formats that animate data and allow viewers to click on images for further information.

Alternatively, we can create **charticles** that provide succinct narrative around a key statistical finding or series of findings. Charticles can range from several sentences to 500 words.



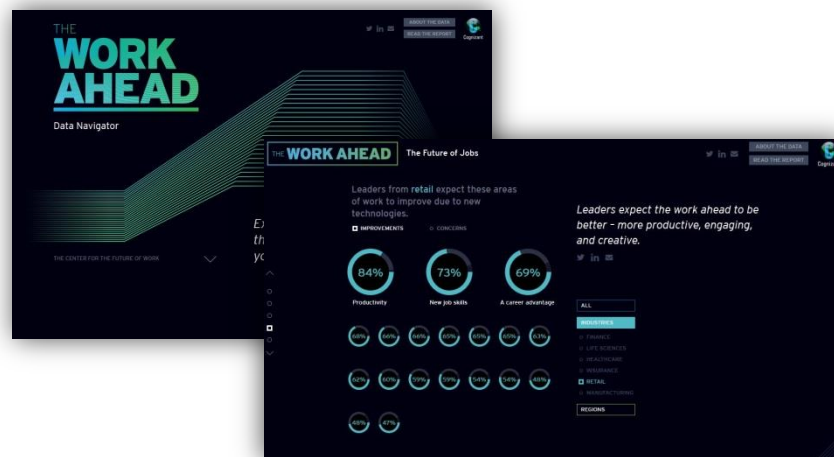
Infographics can be used on social media

Data navigators and visualization tools

Our economists can go beyond infographics, and turn our statistical output into more **sophisticated analytical tools that will enable your users to navigate, segment, and visualize data** from our research.

These tools will allow executives to access data in a visually exciting format that can be geared to their specific needs. For example, we can create databases from the global survey results which can enable users to compare trends and strategies across sector and geography.

Data visualization and interactive infographics provide data access on digital platforms, encouraging engagement by worldwide audiences from any device—computers and tablets to smart phones. They can be launched from websites, gated or ungated, and amplified on social media channels.



[Test the Visa data tool from this link](#)

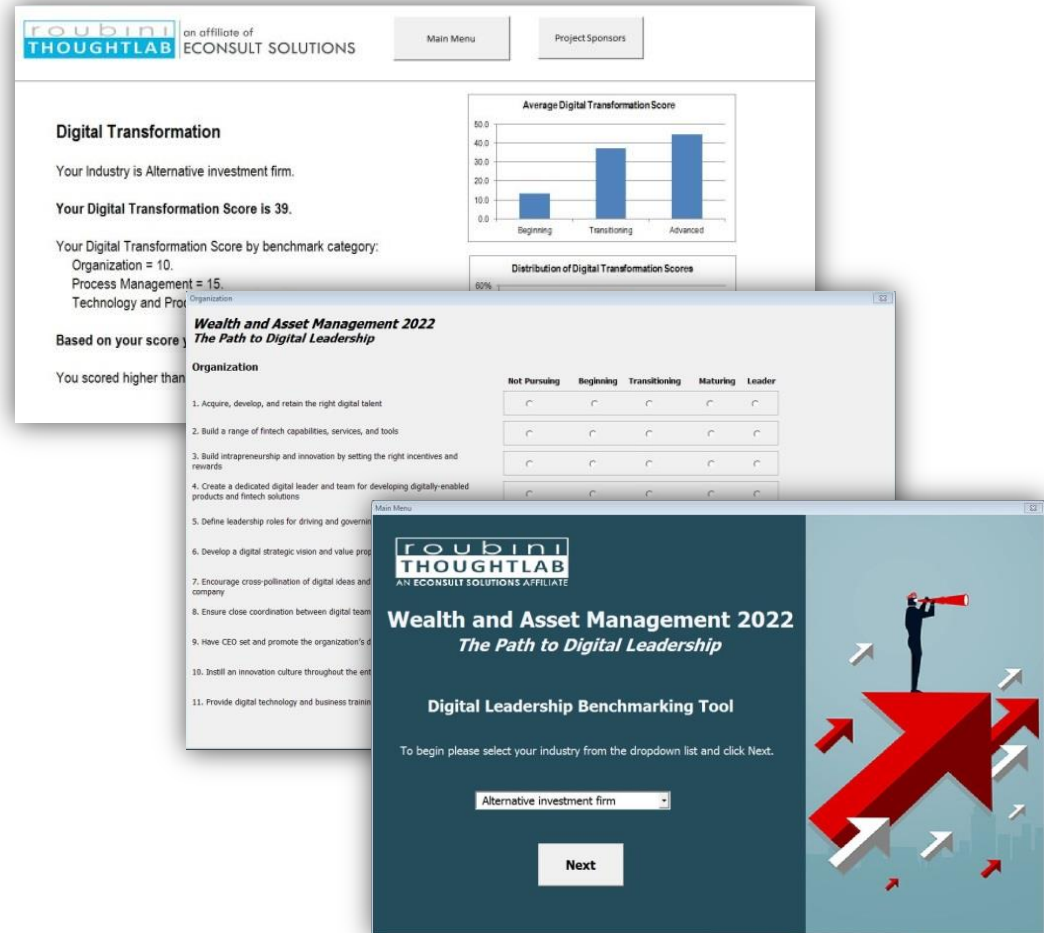
[Link to Cognizant's data navigator](#)

Benchmarking tools and indexes

To help clients see how their digital approaches stack up against their peers, ThoughtLab can produce an interactive **benchmarking tool** based on the our investment research results.

The tool will present a series of questions for executives to answer on your topic and compare their answers with those of other firms in their sector and region drawn from the global survey.

Executives will be able to compare their strategies and progress with those of their peers. They can also filter the results to see how responses differ by industry, region, company size, and other factors.



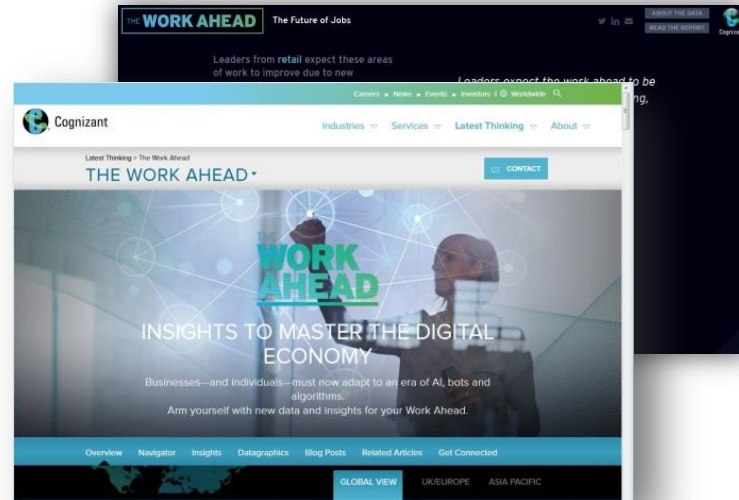
[Test the Wealth 2022 tool](#)

Thought leadership microsites

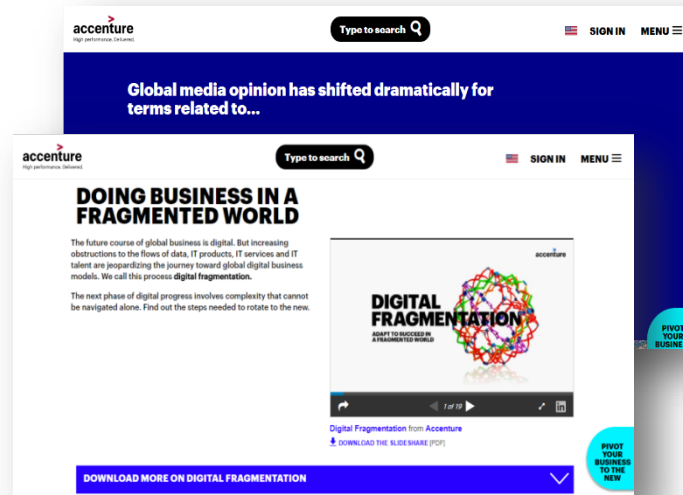
Thought leadership

microsites are on-ramps to a portfolio of valuable data and decision support drawn. They can serve both a repository of published research findings, as well as an avenue to analytical tools and other resources to engage your online audience.

ThoughtLab can work with you to create a content-rich microsite that make your content assets widely available and **search-engine (SEO) friendly**.



[Click to view
Cognizant's
microsite](#)



[Click to view
Accenture's
microsite](#)

Engaging your audience

- Live events
- Client meetings
- Webinars
- Twitter chats
- Internal sales meetings



Live events and client meetings

Your firm's live events are a **prime opportunity to showcase your thought leadership**. Our experts are available to as speakers and panelists for your events or one-off meetings with key clients.

We will work with you to customize a presentation that amplifies your message and helps you engage your target audience.



Webinars

Webinars can be useful for internal team seminars and client meetings. Web collaboration tools such as WebEx, Join.me, and the like enable you to meet your audience face-to-face, and share your screen, **using digitally published content to showcase your expertise.**

ThoughtLab can work with your firm to produce and conduct webinars exploring your preferred deep-dive topic for outreach to clients and prospects, or to educate an internal audience.

We can participate in discussions and provide content and graphics for use during the webinar, working with you to ensure everything has your firm's look and feel.

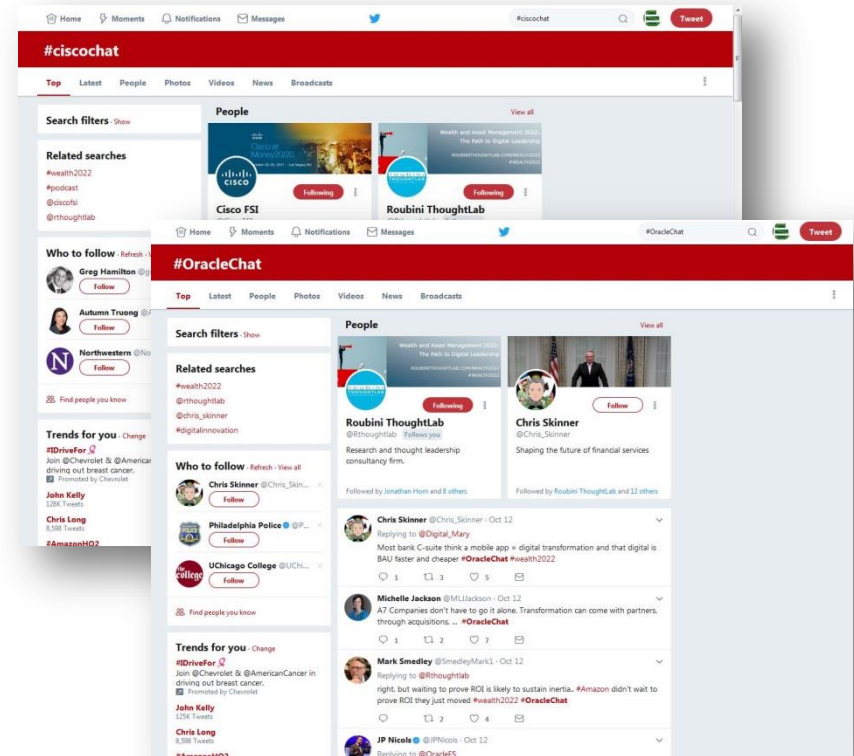


Twitter chats

ThoughtLab can help you organize **Twitter “chats”** on your preferred topic to get wider exposure for the research.

Twitter chats are the social media platform of choice for **wide-reaching live discussion of trending topics**. They are staged for extemporaneous exchange, but are scripted with questions and answers to spur organic conversation between your clients and executives about research findings and how to leverage the results.

We will participate in the chat along with your executives, and help you prepare questions and answers with appropriate graphics.



[Click to view a Twitter chat](#)

Internal sales meetings

We can make **presentations at internal sales meetings to educate your team** about the results and analysis of your selected deep-dive topic. Like with client meetings, often topics can follow interesting yet unexpected tangents. We would stand ready to answer questions about research findings that may be unanticipated, but that may reinforce your team's enthusiasm. We can also help bring discussions back on track to ensure your training goals are met.



ESI THOUGHTLAB

DRIVING BUSINESS THROUGH TAILORED THOUGHT
LEADERSHIP ON WEALTH MANAGEMENT

