



## IT'S NOT FINANCIAL SERVICES, IT'S FINANCIAL SERVICE™

Financial services companies perform a vital role in the economy. But, too often, they are perceived to focus on their own needs, rather than those of the customers and communities they serve.

We provide marketing consulting advice to financial services companies on how to broaden their focus from their internal priorities to what drives value for their customers. By adopting the perspective of the telescope, not the microscope, we help our clients establish the basis for valued added relationships.



### PROVEN PROCESS

We have developed high impact frameworks to define how financial services companies can add value to their customers and grow their businesses profitably:

- **SAVE** (Solutions, Access, Value, Education) How to move from a product-centric to an outcomes-centric approach to business
- **Efficiency and Engagement** How to determine the relative value of improvements in operational efficiency versus strengthening the company's franchise with customers and employees
- **BASE** (Business Analysis of Sector Economics) Understanding the economics of different industry sectors, and the scale of the value that investments in Efficiency and/or Engagement can unlock

### THOUGHT LEADERSHIP

The originality of our thinking is reflected in the number of our articles appearing in the leading management publications:

- **Business Strategy** "Why Brand Trumps Reputation" – SMR 2018; "Selling Solutions Isn't Enough" – SMR 2018; "Rethinking the 4P's" – HBR 2013; "The Hazard of Having an Accidental Brand" – HBR 2010; "Don't Confuse Reputation with Brand" – SMR 2008
- **Merger Strategy** "Why Fusing Company Identities Can Add Value" – HBR 2011; "Value Implications of Corporate Branding in Mergers" – MSI 2010; "The M&A Blind Spot" – WSJ 2007; "Merging the Brands and Branding the Merger" – SMR 2006



To understand how we can help you implement an outcomes-based approach to business, please contact:

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