

# Beacon Strategies

## Sonar

Revealing your field's perspective

### How are we doing?

This is the question the Beacon team is asked by every firm's leadership wherever we go. Understanding how your investment professionals view your firm and the support you provide is essential to achieving success. Actually gathering and interpreting the data required to create a meaningful answer is a complex, labor intensive task few organizations have the resources to accomplish.

### Valuable Insights

Beacon Strategies LLC has developed Sonar to specifically measure and analyze those advisor behaviors and perspectives that influence firm ROI. Sonar combines Beacon's industry knowledge with behavioral science and sophisticated data analytics to accurately measure and evaluate multiple levels of advisor satisfaction (or dissatisfaction, as is often the case). Sonar delivers actionable business insight about your field force enabling you to successfully navigate today's hyper-competitive advisor recruitment and retention environment.

**Does your leadership team possess the critical knowledge to optimize the fit & focus between your firm and advisors?**

Understanding satisfaction dynamics will:

Improve retention of top performers

Increase successful recruitment of those advisors who will thrive

Stimulate practice growth for all advisors

Enhance firm profitability

**Isn't that what you really want to know when you ask the question, "How are we doing?"**



BEACON STRATEGIES, LLC

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## Beacon Sonar Features

### Comparative information analyses

Comparing different groups enables you to validate assumptions, identify trends and uncover complex relationships.

Standard comparisons include:

- Advisor results to management results
- Top advisors to all other advisors
- Results by advisor age, firm length of service and other demographic factors

### Executive level decision making tools

Provide your leadership team actionable information in easy to digest form.

- Comprehensive dashboards summarize results
- Extensive graphical presentations simplify the details
- Data evaluations created for:
  - » Seven functional areas
  - » Eight practice concentrations

### Historical trending

Annual reporting provides both firm and industry data as:

- Year over Year comparisons
- Three and five year trend lines

### Industry Benchmarking

An Annual Industry Report measures your results against industry averages.

# Sophisticated Analysis, Simple Results

Sonar utilizes unique, proprietary processes to deliver results that are intuitive, practical and easy-to-understand. These include identifying:

- Critical differences between top performers and your other advisors
- Unique firm strengths that cement loyalty
- Firm vulnerabilities that effect retention
- Potential conflicts between your firm's management and advisors
- Your advisors belief of your competitive position

## Turnkey Support

From survey administration to regularly updated industry comparisons; capturing and incorporating your demographic data to warehousing past results – Sonar is an end-to-end research solution. We do the heavy lifting of data gathering, analysis and interpretation while you receive usable results.

Contact us today to discuss how we can work with you and your team to measure and maximize your field's performance using Sonar.

The Beacon Team

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