

FOR IMMEDIATE RELEASE

Contacts

Dave Swanson
630-234-1676
dswanson@swandog.com

Mike Evans
617-502-9947
mevans@FUSE-research.com

FUSE and SwanDog to Partner on Breakthrough Marketing Benchmarking Study Release Slated for Summer 2010

FUSE Research Network and SwanDog Strategic Marketing announce an agreement to develop a comprehensive Marketing Benchmark Study of the asset management industry. The study, scheduled for a summer 2010 release, will provide an inside look at how asset management marketing units operate, including structures, responsibilities, budgets, headcounts, and compensation, as well as perspective on how marketing's role is evolving along with the industry.

“This extensive study of marketing will not only provide asset management firms with industry and peer group benchmarks against which to measure their effectiveness today, but will capture how marketing continues to change in response to a new competitive environment,” said Neil Bathon, Partner of FUSE. “We are particularly excited to be working with SwanDog, as we seek partners that are recognized as the best in their field. They bring deep marketing experience and thought-leadership to the project.”

“The market turmoil has left we marketers with a blank sheet of paper, as most benchmarks have reset along with expectations,” said Dave Swanson, founder and managing principal of SwanDog. “How much firms are spending, what they are spending it on, and how they have adapted their organizations to address a new financial advisor and investor mindset are all baseline information that will be essential to the 2011 planning process.”

Bathon notes that the decision to develop the study came in response to client requests for more details about marketing. As a result, the study will be organized by firm attributes, such as assets under management and breadth of product offering, so that firm leadership can benchmark their organizations against their most similar peers.

The marketing study will be FUSE's second installment in its *BenchMark Series*, which is designed to provide asset management firms with industry metrics against which to evaluate their organizations and plan for the future. The first study, *Product Management 2010: Size, Organize, & Optimize*, offers insight into the size and structure of product groups within asset management firms, and the upcoming *Cost of Distribution* study will provide benchmarking



information on compensation, productivity, segmentation strategies, headcounts, and much more.

“We firmly believe the combination of our research capability and SwanDog’s practical marketing acumen is going to be very, very powerful,” added Michael Evans, President of FUSE

About FUSE Research Network LLC

FUSE was launched with the view that research and consulting support for asset managers has failed to evolve with the changing needs of the client. The future competitive environment will demand that clients make important business decisions within shorter and shorter timeframes.

In order to support clients in this setting, FUSE provides a dynamic research platform that covers our clients’ current and future decision areas (strategic and tactical). Our goal is to become an invaluable business partner through the delivery of highly informed and forward-looking recommendations that are among the critical inputs our clients need to optimize results.

About SwanDog

SwanDog is a Chicago-based marketing strategy boutique exclusively serving asset and wealth management. SwanDog works to increase client relevancy through brand strategy development and implementation, contributes to firm growth through marketing program development and helps elevate financial marketers at all levels through training, mentoring and thought leadership.

