



2014–15 MacroMonitor

Easier Access = More Value

Consumer Financial Decisions
Strategic Business Insights
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The 2014–15 MacroMonitor Is a Great Value

Consumers can choose from an ever-expanding set of financial providers, channels, and products. When a customer buys one of your products, you may think a relationship has developed. However, the customer may think of your organization as a utility or of your products as commodities. You may have a lot of information about customers who own your products, but how well do you know all your customers' financial needs and how they balance their time, money, and competing family priorities? To answer this critical business question, you need more than big data. You need smart data.

The MacroMonitor provides smart data at great value.

Are you on data overload? Do you have disparate information sources that you must append? When making strategic business decisions, can you see the forest or only the trees? What you don't know can hurt you!

The MacroMonitor offers a view of the marketplace at a great value.

Our 2014–15 focus is to provide new tools to help you get more value for your research dollars with the addition of:

- **Ruby Laser BASIC:** A web-based application to access data easily
- **Executive Reports:** Concise, cherry-picked insights in a new graphic format
- **Quick Stats:** A reference library of charts that provide trended data at a glance
- **Profile and Implications Summary Package:** Selected data tables with charts about each month's topic
- **“Dirty Dozen”:** 12 annotated graphic-analysis slides with key findings noted.

The MacroMonitor:

- Provides comprehensive, balanced, unbiased, validated, single-source data about all US economic households (with over 2,000 affluent households)—all the combined information about households in one place
- Enables over three decades of reliable tracking and trending to show how household populations' behaviors and preferences have evolved—where households have been
- Measures several hundred financial attitudes that help you to understand consumers' directions because attitudes are the precursor to behavior changes—where households are heading
- Offers robust consumer-segment profiles (beyond demographics and product ownership)—with easily created or appended proprietary segmentations.

CFD's smart analyses and insights help organizations develop strategy to answer questions such as, Why should consumers buy from you? What product gaps exist? How fast is mobile use expanding?

Call (+1 609 378 5044) or email today to learn more about why the MacroMonitor is a great value.

2014–15 MacroMonitor Subscription Form

We agree to become a subscriber of the 2014–15 MacroMonitor. We understand that the price is for a two-year subscription, half billable immediately and half billable in January of next year. The products and services in this subscription are for the sole and confidential use of subscribers and may not be disclosed to others without CFD's prior approval. Subscription provides a license for one corporate site. Deliverables are on the following page.

2014–15 MacroMonitor (4,000 respondents with 2,000 affluent households) includes all New and Standard MacroMonitor and CFD deliverables.

\$60,000/year (\$120,000 total) \$ _____

Optional deliverables are available for purchase at any time. However, if you would like to reserve some optional deliverables now, please indicate which ones below:

Syntax CD (SPSS, SAS, and Quanvert dataset) \$3,000 \$ _____

_____ \$ _____

_____ \$ _____

Total \$ _____

Signature _____ Date _____

Name _____

Title _____

Company _____

Address _____

City _____ State _____ Zip _____

Telephone _____ Fax _____

Email _____

**Please fax completed form to SBI: +1 650 859 4544 or
scan and email to smcgregor-noel@sbi-i.com.**

The Subscriber agrees that it will not use the name of Strategic Business Insights (SBI), Consumer Financial Decisions (CFD), or MacroMonitor either expressed or implied in any of its advertising or sales promotional material. Because the project is of an advisory nature, neither SBI nor its employees assume any liability for special or consequential damages arising from the Subscriber's use of the project results. In no event shall SBI's liability to the Subscriber exceed the dollar amount of this agreement. The Subscriber agrees to indemnify, defend, and hold SBI, its officers, and its employees harmless from any liability to any third party resulting directly or indirectly from the Subscriber's use of any project report or other deliverable produced by SBI pursuant to this agreement.

2014–15 MacroMonitor Deliverables

NEW DELIVERABLES

- Ruby Laser BASIC: A web-based application to create custom tables easily
- Executive Reports: Concise reports about major trends and current topics
- Tables and Charts: The data tables and related charts upon which the monthly Profiles and Implications Summaries are based
- The Dirty Dozen: Annotated graphic-analysis slides related to each month's topic
- Quick Stats: A fast-reference chart library of key population trends (2002–14).

STANDARD MACROMONITOR DELIVERABLES

- Database—ASCII dataset
- Ruby Laser BASIC—including training and one unique user name and password
- Subscriber Orientation—review of coverage and deliverables with Q&A on your needs
- Top-Line Findings—survey results trended to the previous year's results
- Standard and Affluent Tabulations of data by standard and affluent banners
- SGAs (Standard Graphic Analysis)—over 600 charts for each of six key populations
- Profiles and Implications (P&I) Summaries—two pages of key facts about the monthly MacroMonitor Market Trend population
- P&I Tables and Charts—data tables to create the monthly summary with charts comparing included and related populations
- References and Resources—online definitions and methodology questions
- Quick Stats—fast-reference chart library of key population trends (2002–14)
- Web access through your private, password-protected landing page.

STANDARD CFD DELIVERABLES

- Presentation of findings: Macro trends and implications from the consumer's POV
 - Monthly MacroMonitor Market Trends Newsletter
 - Monthly Profiles and Implications Summary (formerly Segment Summaries)
 - “Dirty Dozen”: Annotated graphic-analysis slides related to the P&I Summary
 - Executive Reports: Concise reports about major trends and current topics
 - Sixteen hours: Two days of use-anywhere consulting.
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OPTIONAL MACROMONITOR AND CFD DELIVERABLES

- Additional site license
- SPSS, SAS, and Quanvert dataset
- Prepaid consulting and service hours with discounts available for large projects
- Ruby Laser PREMIER: The full dataset with additional functions and capabilities
- Custom crosstab: Your selection of 18 segments that are run by the entire database
- Custom weighting
- Custom Graphic Analysis (CGA): Your selection of 6 segments to run; over 600 PowerPoint slides are available
- Proprietary recontact and customer oversample surveys
- Executive Briefing: A recap of CFD findings about and implications for your enterprise
- Custom strategy projects such as Product Ideation and Opportunity Discovery
- Customized presentations: Your pick of topic; our presentation of findings
- Custom half-day work sessions: Your pick of topic; collaboration about findings
- Segmentation workshops: CFD's extensive segmentation experience leveraged and integrated with your objectives
- Collaborations with other consultants, advertising agencies, and research companies to support our sponsors on their most important projects.

[Get more](#) detail about MacroMonitor's 2014–15 Deliverables.

For More Information

The following links are available for your convenience:

- [MacroMonitor Is a Great Value](#)
- [Methodology](#)
- [Scope and Coverage](#)
- [How Subscribers Use the MacroMonitor](#)
- [Consumer Financial Decisions and MacroMonitor History](#)
- [Validation](#)
- [2014–15 MacroMonitor Deliverables](#)
- [2014–15 Schedule](#)
- [Sample Sizes](#)
- [2014–15 Subscription Form](#)

EXAMPLES OF DELIVERABLES

- [Crosstabs](#)
- [Standard Graphic Analysis \(SGA\)](#)
- [Profile and Implications \(P&I\) Summary Tables and Charts](#)
- [Quick Stats](#)
- [Dirty Dozen](#)
- [Executive Reports](#)
- [A Taste of Presentations Topics \(CFD Presentations\)](#)
- [MacroMonitor Market Trends Newsletter](#)

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