

# Sales & Marketing

## Background



- Marketing Manager, Global Assets, Vanguard
- Common Titles: Sales and Marketing Manager, Marketing Manager, Pricing Manager, Head of Sales
- Don is an influencer in his firm and will need accurate information to create sales and marketing strategies
- Don has been with Vanguard for 5 years
- He is very familiar with business and financial intelligence products and views the S&P 500 as a credible and critical partner in the market.

**I partner with external stakeholders on conferences and events that showcase our strengths and the value we bring to the markets.**

## Goals

### RATIONAL GOAL

- I need to ensure we align ourselves with external stakeholders that share the same values of delivering excellence
- Develop strategies that increase brand awareness, grow market share and drive customer loyalty

### EMOTIONAL GOAL

- “I want to build credibility with my customers and be seen as a subject matter expert.”
- “I want to increase sales and have the best performance and bonus this year so I can buy a luxury item.”

## Pain Points/Challenges

- I don't have time to research and obtain accurate data on market impacts
- Evaluating potential target markets, identifying new prospects, and gathering reliable contact information
- Generating accurate prospect lists

## Needs

- Stay up to date with all events in the market for all asset classes and sectors my company covers

## Issues To Solve

- Receiving the latest benchmark prices in a timely fashion to base operations on and settle contracts against
- Up-to-date information on S&P Global events for our critical thinkers to participate in to expand our exposure and relevance to all market participants

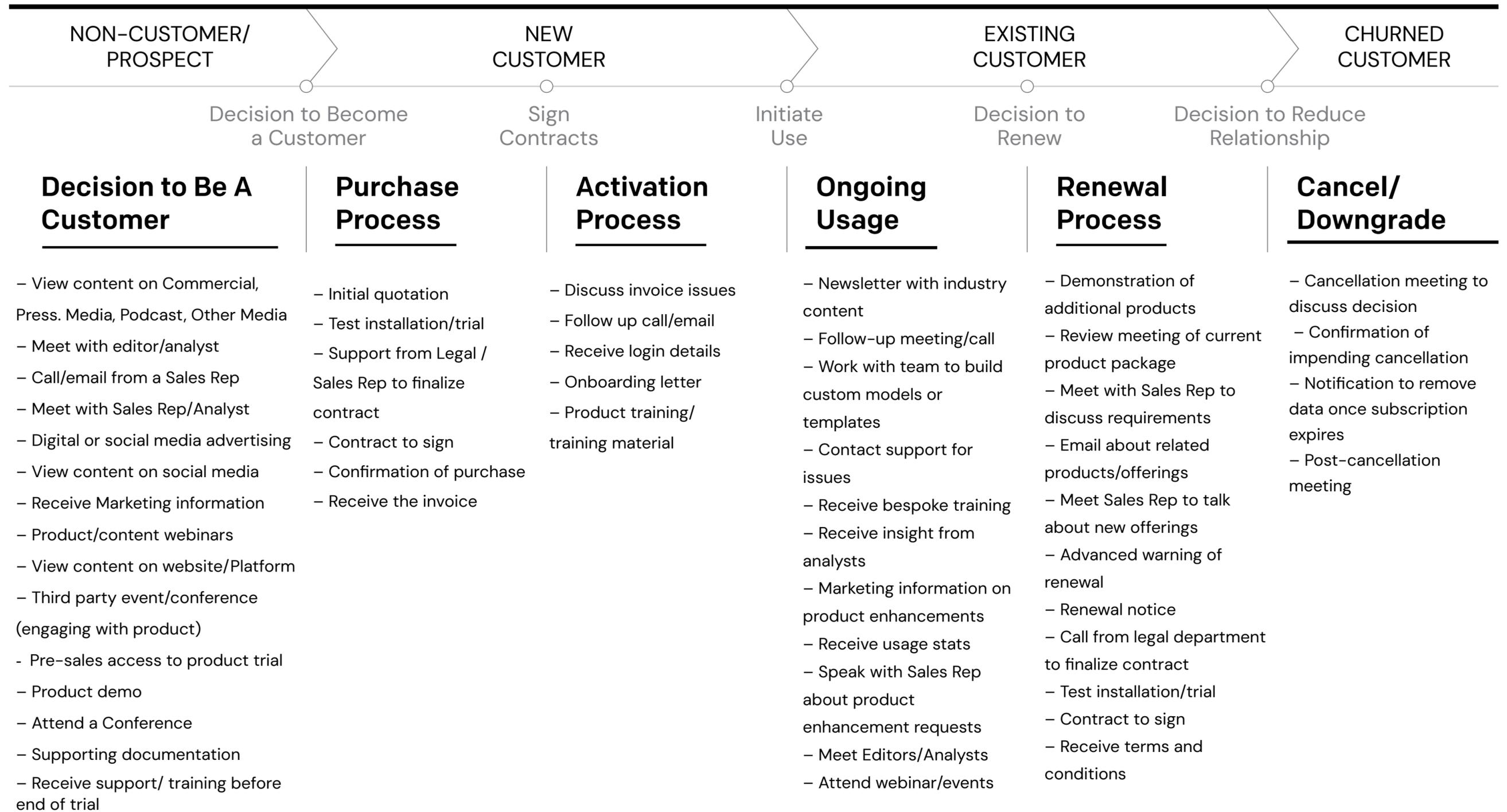
## Content To Provide

- Capital IQ Pro: Demographics dataset to help evaluate new markets on a variety of demographic factors in order to quickly and easily identify opportunities and facilitate outreach
- S&P Dow Jones Indices: Research and insights including performance reports and commentary on trend

# Key Moments in the Customer Journey



Most important touchpoints in the journey = Key moments of truth



Adding more online customer service can help people get quotes more quickly and easily.