

## E-BUSINESS EXCHANGE

### INVITATION

DALBAR is pleased to announce the E-Business Exchange (EBX), a forum of technology decision-makers within the financial services industry who are leaders in setting strategy for developing and delivering e-business services.

Held three times per year, the E-Business Exchange brings together decision-makers for a discussion of the latest innovations in transferring traditional costs to the Internet. In coordination with the latest DALBAR research, the meetings enable members to gain a thorough understanding of the latest industry trends – as well as gain insight into the newest best practices that deliver success.

The E-Business Exchange also offers a valuable networking opportunity: the chance for peers to exchange ideas about current challenges, prior successes/failures, and future goals.

### AGENDA FOR MEETINGS

The E-Business Exchange marries DALBAR'S industry expertise with a discussion of the issues that are of greatest importance to members. Topics are typically addressed in three segments:

- Ø Latest DALBAR Research: At each meeting, members gain exposure to DALBAR'S latest findings and commentary on emerging issues. DALBAR'S expertise and understanding of the online user experience for mutual fund, life insurance, annuity, and retirement plan products provides members with the latest trends on which to focus. In conjunction with DALBAR'S in-depth analysis of customer needs and preferences, E-Business Exchange members learn about best practices for delivering e-business solutions.
- Ø Peer Experience & Insight: Members share their latest website enhancements and discuss how they manage the business, compliance and technical requirements behind the initiatives. Members also discuss successful strategies and failures associated with increasing website adoption.
- Ø Special Guests: A key source for learning about leading edge developments is from the people making the news! DALBAR brings in those peers and innovators who are successfully initiating change.

## MEETING DATES & MEMBER BENEFITS

The E-Business Exchange will meet at DALBAR'S Boston Office on the following dates:

- Ø March 4, 2010
- Ø June 10, 2010
- Ø October 14, 2010

In addition to these meetings, members also receive the following:

- Ø DALBAR'S WebMonitor Quarterly Rankings & Trending Report for your industry.
- Ø Optional Quarterly Individualized Scoring Reports are available on demand for \$500 each.

## MEMBERSHIP DUES

A one-year membership to the E-Business Exchange costs \$9,500. Subscribers may add an additional member for \$3,500.

Current subscribers to DALBAR's WebMonitor program can join the E-Business Exchange for \$7,500.

## BACKGROUND

The E-Business Exchange is another avenue for DALBAR to deliver value to financial services firms. By bringing together industry leaders in a collaborative environment, DALBAR enables financial services firms to greatly improve their success in stimulating customers to shift away from high cost traditional processes to Web-based and other electronic systems.

By now, leading institutions have learned that offering Web services is only the start of the E-Business transformation. In the past, institutions asked how they could change user behavior so that users would utilize Web-based products. The E-Business Exchange addresses the more challenging issue of how to change website behavior in order to support users' offline behavior. By offering "Behavior Centric" online services, institutions are better positioned to acquire online business and realize the profitable promise of E-Business.