

# Adox 8x8 Survey Client Reporting

## Your View of the Market

### 1) Please provide your business email address.\*

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

#### 2) In your estimate, what is the size of the global market for client communications and reporting technology in USD? \*

( ) 0-50 million

( ) 50-100 million

( ) 100-250 million

( ) 250-500 million

( ) more than 500 million

( ) Other - Write In: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

### 3)  In your estimate, what is your current share of the market? If you are unable to provide this, please provide a short explanation.\*

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### 4) In your estimate, how many financial institutions use your solution or service?\*

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#### 5) What is the geographical split of firms using your solution or service?\*

\_\_\_\_\_\_\_\_UK

\_\_\_\_\_\_\_\_USA

\_\_\_\_\_\_\_\_EU (non-UK)

\_\_\_\_\_\_\_\_APAC

#### 6) What is the industry segment split of firms using your solution or service? What is the percentage for each segment of the total number of users?\*

\_\_\_\_\_\_\_\_Banks/ Sell Side

\_\_\_\_\_\_\_\_Asset Managers / Buy Side

\_\_\_\_\_\_\_\_Custodians / Fund Administrators

\_\_\_\_\_\_\_\_Depositories

\_\_\_\_\_\_\_\_CCPs / Exchanges

\_\_\_\_\_\_\_\_Hedge Funds

\_\_\_\_\_\_\_\_Wealth Managers/RIAs

#### 7) Please rank the below macro-trends in order of impact on the current client reporting competitive landscape  (1 = highest impact)

\_\_\_\_\_\_\_\_Consolidation

\_\_\_\_\_\_\_\_Enterprise IT (BI, ETL, MDM and others)

\_\_\_\_\_\_\_\_Integration end-to-end platforms

\_\_\_\_\_\_\_\_Wealth management/retail reporting providers

\_\_\_\_\_\_\_\_CRM providers

\_\_\_\_\_\_\_\_Marketing Automation providers

## (untitled)

#### 8) Pease rank the value drivers that are most important to buyers of client reporting technology in your experience (1=most important)

\_\_\_\_\_\_\_\_Cost Reduction

\_\_\_\_\_\_\_\_Regulatory compliance

\_\_\_\_\_\_\_\_Improving customer experience

\_\_\_\_\_\_\_\_Closer integration with enterprise applications

\_\_\_\_\_\_\_\_Functional coverage of end to end reporting

\_\_\_\_\_\_\_\_Improved asset class and instrument coverage

\_\_\_\_\_\_\_\_Improved portal and online reporting capabilities

## (untitled)

#### 9) What is the relevance or impact on client reporting projects of the following regulations in the next 12 months?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Not Relevant** | **Low Direct Impact** | **Indirect Impact** | **High Direct Impact** |
| AIFMD | ( )  | ( )  | ( )  | ( )  |
| CRS | ( )  | ( )  | ( )  | ( )  |
| DOL | ( )  | ( )  | ( )  | ( )  |
| Dodd Frank | ( )  | ( )  | ( )  | ( )  |
| FATCA | ( )  | ( )  | ( )  | ( )  |
| FRTB | ( )  | ( )  | ( )  | ( )  |
| MIFID II/ MIFIR | ( )  | ( )  | ( )  | ( )  |
| MAR | ( )  | ( )  | ( )  | ( )  |
| SFTR | ( )  | ( )  | ( )  | ( )  |
| RAR | ( )  | ( )  | ( )  | ( )  |
| Priips | ( )  | ( )  | ( )  | ( )  |

#### 10) In your expectation,  when will the following technology and industry advances start to have an impact on client reporting projects and solutions?

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | **limited impact in the next 2 years** | **mainstream impact in the next 2 years** | **low impact in the next 2 to 5 years** | **mainstream impact in the next 2 to 5 years** | **in use now** | **unlikely to make impact in the next 5 years** |
| Blockchain/Distributed Ledger | ( )  | ( )  | ( )  | ( )  | ( )  | ( )  |
| NoSQL databases | ( )  | ( )  | ( )  | ( )  | ( )  | ( )  |
| In-Memory databases | ( )  | ( )  | ( )  | ( )  | ( )  | ( )  |
| Artificial Intelligence | ( )  | ( )  | ( )  | ( )  | ( )  | ( )  |
| RPA Robotic Process Automation | ( )  | ( )  | ( )  | ( )  | ( )  | ( )  |
| Interactive Assistants/Bots | ( )  | ( )  | ( )  | ( )  | ( )  | ( )  |

## Validating the 8x8 metrics

#### 11) Why are firms selecting your solution? What are they telling you about your ability to differentiate?  Please use the sliding scale to rank how users rank your ability to differentiate from 1 (lowest) to 5 (highest).

|  |  |
| --- | --- |
| Usability - allows end users to achieve business goals | 0 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_[\_\_]\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ 5 |
| Integration - fits with existing platforms | 0 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_[\_\_]\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ 5 |
| ROI & Value for Money - benefits outweigh investment cost | 0 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_[\_\_]\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ 5 |
| Vision/Innovation - adaptable to future company direction | 0 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_[\_\_]\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ 5 |
| Functionality - delivers core and ancillary business functions | 0 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_[\_\_]\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ 5 |
| Deployment - aligns with IT architecture | 0 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_[\_\_]\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ 5 |
| Support/Service - equipped to handle various needs | 0 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_[\_\_]\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ 5 |
| Supplier Risk - established, reliable company | 0 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_[\_\_]\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ 5 |

#### 12) As we score and assess the following metrics, how should the scores for each metric be weighted? Please select how relevant each metric is to users in your view.

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Highly Relevant** | **Somewhat Relevant** | **Less Relevant** |
| Usability | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Functionality | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Integration | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Deployment Model | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| ROI Model | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Support & Service | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Vision & Innovation | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Supplier Risk | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

#### 13) What stops firms from moving forward with investing in client reporting technology? Please use the sliding scale to rank how often you hear each of the below objections with 5 being very often and 1 being not often at all.

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| --- | --- |
| System integration (e.g. fit with current architecture) | 0 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_[\_\_]\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ 5 |
| Potential for catastrophic service disruption or system failure | 0 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_[\_\_]\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ 5 |
| Vulnerability to security threats (e.g. data breaches, employee fraud) | 0 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_[\_\_]\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ 5 |
| Scalability of system to planned volume | 0 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_[\_\_]\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ 5 |
| Over-dependence on specialized internal resources | 0 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_[\_\_]\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ 5 |
| Over-dependence on external partners (e.g. outsourcers, third party vendors) | 0 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_[\_\_]\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ 5 |
| Cost of Implementation | 0 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_[\_\_]\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ 5 |

## Differentiators and Proof Points

### 14) Usability - Which specific usability features differentiate your solution's ability to allow business users to achieve their goals independently? What is the impact of these features on the user experience? Please list a maximum of three features with relevant proof points (demonstration, verifiable data point,  customer reference)Typical usability features include (but are not limited to) user interface, reporting, analytics and ease-of-use capabilities, from the perspective of a business end-user.

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### 15) Functionality - Which specific functionality features differentiate your solution's ability to offer asset class and workflow coverage? What is the impact of these features? Please list a maximum of three features with relevant proof points (demonstration, verifiable data point, customer reference)Typical functionality features include (but are not limited to) asset class and workflow coverage, geographical or segment specific capabilities.

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### 16) Integration - Which specific integration features differentiate your solution's ability to fit with existing platforms? What is the impact of these features? Please list a maximum of three features with relevant proof points (demonstration, verifiable data point, customer reference)Typical integration features include (but are not limited to) connectivity to business applications, technical integration standards, and external standards for information exchange, or specific eco-system benefits.

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### 17) Support & Service - Which specific features differentiate your organisation's ability to offer flexible and high quality support? What is the impact of these features? Please list a maximum of three features with relevant proof points (demonstration, verifiable data point, customer reference)Typical support and service features include implementation and production support, help desk, training, geographical coverage, and active user community input.

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#### 18) Deployment model - Which specific deployment models does the solution support?

[ ] Software as a Service (SaaS)

[ ] Managed Service

[ ] ASP/Hosted

[ ] On Premises

[ ] Other - Write In: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

### 19) Vision and Innovation - Which specific features differentiate your organisation's ability to offer a complete and future-proof solution? What is the impact of these features? Please list a maximum of three features with relevant proof points (demonstration, verifiable data point, customer reference)Typical vision and innovation features include roadmap support for future regulatory or analytical requirements, technology breakthroughs, or planned integration with internal or external platforms and market participants.

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### 20) Supplier Risk - Which specific features differentiate your organisation's ability to offer ongoing investments in product and service capabilities? What is the impact of these features? Please list a maximum of three features with relevant proof points (demonstration, verifiable data point, customer reference)Typical supplier risk mitigation includes detail on the size and stability of product and support teams, stability of management and organizational structure, ability to support global or regional operations, profitability and ability to invest in product innovation and R&D).

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### 21) ROI & Value for Money - Which specific pricing or deployment features differentiate your solution's ability to reduce cost or offer increased business value? Typical ROI and value for money features include details of pricing models, ROI projections, bundling of value-added services, volume or usage based discounting, cost-saving impact of service delivery (risk, fines, customer acquisition and retention, operational costs, staffing, infrastructure costs).

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### 22) Please list up to three other highly differentiating features or attributes, which are not covered in your answers to the 8 metrics. Please provide relevant proof points (product demonstration, verifiable data point, customer reference).Only list features here which do not fit in any of the other eight metrics.

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## Thank You!