

## Excella Overview

Excella delivers strategic marketing solutions to financial institutions of all sizes so they can accelerate profitable growth in the institutional and high-net-worth markets.

### OUR CLIENTS

- Banks
- Brokerage firms
- Custody providers
- Global asset management firms
- Wealth management providers
- Specialized service providers

### OUR SERVICES

- Marketing strategy
- Marketing programs
- Product development

### OUR FOCUS

#### [Creative thinking](#)

We use our experience and expertise to develop powerful solutions that solve your most complex product and marketing needs and propel your business to its highest potential.

#### [Custom solutions](#)

We create a new, individualized strategy for every client via a highly consultative approach that includes thoughtful review of your business and your goals. Our toolkit is deep – we can recommend ways to enter new markets, develop and launch new products, and establish lifetime client loyalty.

#### [Results](#)

We have a proven track record of helping clients strengthen their competitive position by building lifetime relationships with their most profitable customers.

REAL-WORLD EXPERIENCE TO SUPPORT YOUR MOST COMPLEX NEEDS

[Ani Yessaillian, principal and founder of Excella](#)

Ani has more than 20 years of experience in marketing, product development, and business development. Prior to launching Excella, Ani spent nearly 10 years with Fidelity Investments. As a vice president with Fidelity, she played various roles in the investment management, marketing, and charitable planning arenas. Ani also spent time as a management consultant with PriceWaterhouse Coopers, LLC. Ani has an MBA from Columbia University.

[Lisa Alemlian, senior consultant](#)

Lisa has more than 25 years of experience in the financial services industry, including various marketing, relationship management, and operations positions at Bankers Trust Company and State Street Corporation. At State Street, Lisa was a vice president responsible for client satisfaction and loyalty programs as well as information research and competitive intelligence. Lisa is a graduate of Smith College.

RECENT ENGAGEMENTS

[Created powerful, comprehensive selling system for capital markets products](#)

Seeking to build distribution of its offering in the RIA channel, a financial services provider engaged Excella to create a comprehensive selling system to help a team of over 100 sales professionals introduce the firm's equity, fixed income, and specialized products to financial advisors. Excella empowered the sales team with four main components:

- Profiling tools to identify potential clients and their specific needs
- Case studies to demonstrate client benefits of each product
- Sales scripts to coach the sales team on successful client conversations
- FAQs to respond effectively to client objections

Since its launch in late 2008, the selling system has received uniformly positive reviews from the sales force.

[Developed international expansion strategy for national brokerage firm](#)

Looking to expand its business internationally, a one of the nation's leading brokerage firms engaged Excella to help senior management determine whether to develop a global custody offering. Excella conducted comprehensive research study to better understand: critical target markets, client needs, and opportunities for a product suite that could be customized by market and distribution channel. Excella's two-part study included:

- Qualitative and quantitative research of needs and priorities for both the company's distribution partners and the company's key clients

Based on Excella's research and strategic recommendations, the client has embarked in the development of an international offering that launched in 2009.

### Built suite of business-building workshops for financial advisors

In an effort to help financial advisors at leading brokerage firms around the country build more profitable relationships with their clients, a global asset management firm engaged Excella to develop a suite of robust workshops and self-study programs on the following topics:

- Brand development
- Business planning
- Referrals

Excella successfully created “best practices” teaching tools and self-development products based on in-depth research into financial advisor needs and work patterns. Financial advisors at leading brokerage firms around the country are currently participating in this program.

### Created strategy to increase satisfaction among separate account managers

Needing to improve its relationship with separate account managers, a financial services provider engaged Excella to create a strategy that identified key areas for investment with this important constituency. Excella conducted a research study to understand the priorities of separate account managers, successfully identifying marketing, technology, and service enhancements that would: 1) better fill the needs of these managers and 2) lead to increased assets under management on the provider’s managed account platform. This three-part study included:

- Focus groups
- Executive interviews
- A quantitative survey

To date, the client has implemented more than 40% of Excella’s recommendations.

### Developed brand strategy and communications program for top 50 RIA firm

Seeking to aggressively grow assets under management by acquiring high net worth, family office, and institutional clients, a top 50 RIA firm engaged Excella to develop a comprehensive brand strategy and communications program. Excella provided a strategic and systematic approach to reach target audiences and defined the firm’s core messaging, including its values, approach to working with clients, and service offering. The powerful suite of deliverables included:

- Communications roadmap
- Company brand guide
- Pitch book
- Web strategy and content

LEARN MORE

Contact Ani Yessailian at 617 886-6001 or [AY@excellamarketing.com](mailto:AY@excellamarketing.com).