

## About Interactive Communications, Inc.

Since 1994 Interactive Communications has helped some of the top financial services firms design, build, and increase the effectiveness of their sales force.

We work exclusively with wholesalers – external, internal and hybrid – and their managers, to help them capture today's sales opportunities while preparing them for future trends.

Through our training, coaching, consulting and speaking engagements, we help our clients sell easier, faster and better with measurable results.

## The Principals

Mary Anne Doggett and Claudia Fogelin are the Managing Partners of Interactive Communications. They have spent over 16 years traveling with, listening to, and working with financial services professionals and their management teams to help them improve their sales results. Although they complement each other well, their clients appreciate their yin and yang approach to solving distribution problems, not to mention their sense of humor.

Mary Anne is outspoken and not afraid to question the status quo. She likes to create positive turbulence that motivates new kinds of thinking and helps set strategy. Claudia can take a concept and bring it to life. She has an affinity for process and actually likes program design and project management.

Known for their unique approach to sales consulting, training and coaching, they quickly identify issues and opportunities and put in place processes to deliver results that endure. Through their work with top financial services firms they have earned a reputation as experts in leading edge distribution strategies. Mary Anne and Claudia are often quoted in the financial services press, are featured speakers at industry conferences and author popular and valuable white papers and research studies for the industry.

Prior to founding Interactive Communications Inc., both Managing Partners worked with Citigroup in a variety of line management positions. Mary Anne holds an MBA from the New York University School of Business and Claudia holds a Masters from Columbia University.

## Core Offerings



### Training

To help front line sales people and their managers acquire strong relationship-based sales skills, customized to reflect their firm's business priorities



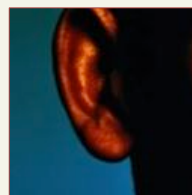
### Coaching

To accelerate skill mastery, with a focus on top performers who deliver the largest percentage of business and tailored to the firm's specific needs



### Consulting

To help clients increase sales results, improve efficiency and effectiveness, realign distribution models and assess sales effectiveness



### Speaking

To motivate continuous improvement and new ways of thinking about changing industry trends with real life observations, research results and best practices

# Specialized expertise in wholesaling and distribution

## Our Beliefs

At Interactive Communications, we believe that in order to sell you must first know what a person needs.

- › Good sales conversations are based on a consistent structure.
- › Successful sales conversations move the sale forward with a specific, measurable action.
- › The stage of your relationship determines the way you sell to a person.
- › The most successful sales people adapt their selling style to meet the client's style and language preferences.
- › Integrity and the ability to understand what a person needs are more powerful than sales "techniques."
- › Like the best athletes, sales professionals need coaches and believe that practicing is fundamental to their success.
- › Pitching is not selling.
- › Without preparation and practice, you need to be lucky.

## How We Are Different

At Interactive Communications we prefer to be ahead of the curve. Today's constant is change and we embrace it to help our clients thrive.

Because of this we continually adapt our products and services to help clients overcome current challenges, match moving landscapes and incorporate fresh ideas. The core engine of what Interactive does has been in place for years, so our clients can be confident it delivers impact. But we also believe that it is critical to layer on what's next.

Perhaps most important, our Managing Partners spend a significant amount of time out in the field coaching and observing sales interactions. We understand what's actually happening on the ground with representatives / their end clients and across firms. This allows us to challenge conventional thinking and push back to help our clients get the best possible result.

Because of our high degree of specialization in the industry, no other sales consulting or training firm knows as much about the wholesaling field as Interactive Communications.

We willingly share our recipe for the secret sauce to enable our clients to do things on their own. That's probably why most clients we work with keep coming back for more.

## Are We Right For You?

At Interactive Communications, one of our core beliefs is that "one size does not fit all." True to that belief, we don't try to be all things to all people.

After many years of helping clients increase their sales effectiveness and efficiency, Interactive Communications has found the firms that benefit most from our knowledge and experience share certain key attributes. These firms:

- › Value a disciplined, consistent, needs-based sales process.
- › Create accountability based on quantitative and behavioral measures.
- › Expect their sales force to have a concise and compelling answer to the question, "What makes you different?"
- › Are willing to establish a target market and who they won't work with — and require reps to profile prospects for that target.
- › Commit themselves to sales coaching at all levels of the organization.
- › Believe that the roles of both phone-based and field-based sales reps are changing and want to stay ahead of the curve.
- › Believe that technology — especially the firm's CRM — should play a core role in the sales process.
- › Believe that even experienced sales professionals need coaching and skill development.

## Client List

AllianceBernstein	Natixis Global Associates
AXA	New York Life
Citigroup	Nuveen Investments
Charles Schwab	OpenheimerFunds
Fidelity Investments	PIMCO
First Trust	Pioneer Investments
Goldman Sachs	Putnam Investments
ING Funds	SEI
Ivy Funds	Wells Fargo Funds Distributor
MetLife	



**Interactive Communications, Inc.**  
122 East 42nd Street, Suite 3006  
New York, NY 10168  
Phone: 212-838-8500  
Website: [www.interactive-com.com](http://www.interactive-com.com)