

Beyond StyleAdvisor

Renee Putman
Product Placement Analyst,
Janus Portfolio Analytics

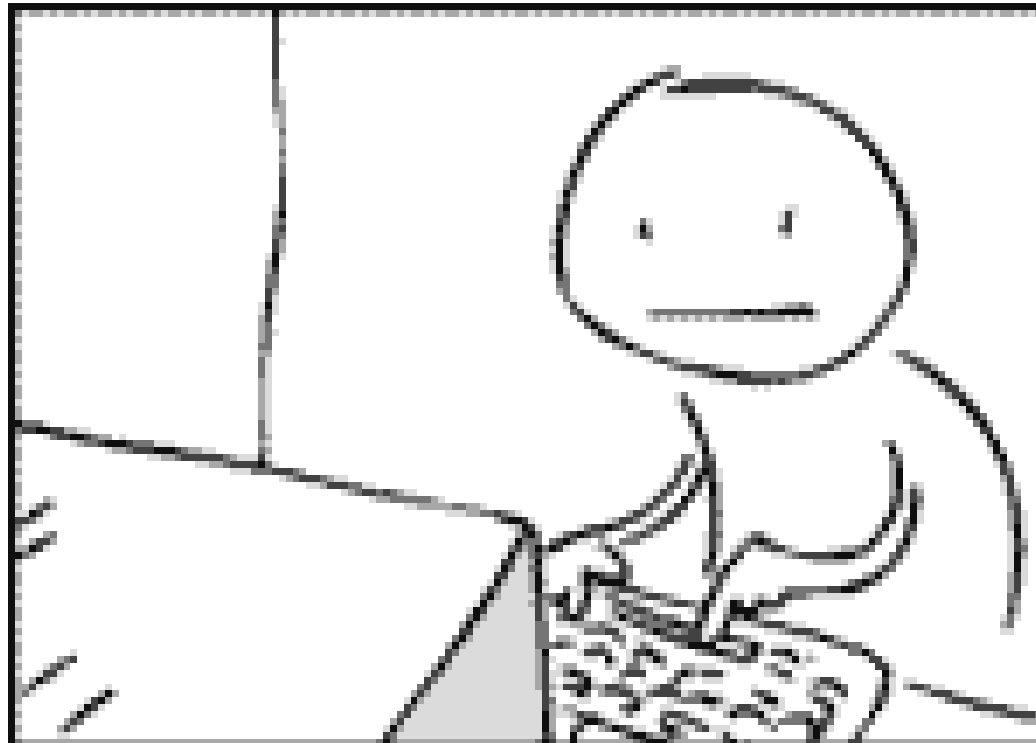
JanusINTECH
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Does This Look Familiar?



Why Did We Want This?

- The need to keep up with a growing salesforce
 - 9 wholesalers back in 2002, today we have 44
 - Internal desk has grown from 4 to 23
- Our sales model has shifted to focus on advisors
 - Advisors are a sophisticated audience, they want to see more than just performance
 - We needed a tool that could illustrate the strengths of our portfolios against competitors
- Internal training/turnover issues
 - In the last 6 months I have trained over 15 new users
 - Choosing a user-friendly system was very important
- Cost considerations
 - Increased sales staff = more licenses = higher cost
 - IT maintenance-free, we needed this to be fully automated



What Issues Has It Helped Solve?

- Consistency with our message

- There are 3 templates to choose from that can not be changed by the user
- Templates were designed to create a logical flow to the way our sales people talk about fund comparisons

- Compliance issues

- Reports no longer need to go through the 3-day compliance review process
- All footnotes and disclosures are automatically added to each report

- Marketing

- Reports are designed with the same look and feel as other Janus collateral materials

- Increased understanding of statistical concepts

- Our sales force is responsible for being able to interpret any and all material they send out
- Implemented a “Statistics 101” course for all of our internal desk new hires, as well as annual training for our external sales force



Where Do We See This Going?

- “Trial analysis” for advisors accessed through a Janus website
- Customized portfolio building solutions – the ability to construct “blends of blends”
- Adding a second Janus website for our Institutional business to include separate accounts



Sample Report

<http://janus.zephyrtahoe.com/Logon.aspx?client=janus>

