Overview of the research process

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As described in the overview, Synaptic's core research process is as follows:

1. **Choose the type** of product to research.
2. **Enter client details**, and any benefits/contributions which are applicable to the type of product.
3. **View information about the available contracts** – e.g. by building spreadsheet-style grids – and filter the list so that it removes contracts which cannot satisfy the client's requirements.
4. **Rank the contracts** into a league table.
5. **Select the contract** which is being recommended (e.g. the top contract in the league table), and generate a suitability report.

This full process is obviously geared towards the need of advisers making a recommendation to a client, and is referred to as "**client-focused research**".

Synaptic Research is also a powerful tool for "**product-focused research**" – general research into the market, in order to construct panels, analyse competing products etc. Stages 2 and 5 above (and sometimes 4) are not normally relevant to product-focused research, and are simply skipped.

In other words, Synaptic Research is a single, flexible system which caters for multiple research scenarios. There's no need to learn how to use two (or more) systems in order to carry out different types of research.

The system complements this flexibility with a number of different types of report (in addition to suitability reports) which can be generated at different stages of the research process:

- Spreadsheet-style grids of contract data.
- Comparisons of all the features of specific products.
- Contract, fund, and company factsheets.

- Ranking league tables.
- The ability to save all the above in PDF form, for easy distribution to colleagues or publication on an intranet.
- If your firm has paid for the extra module, the ability to export of all the above, in CSV format for Microsoft Excel.