



# Briefing Request Form

## **About Your Company (or the Company Requesting the Briefing Whom You Represent):**

Your company's name (and your division's name, if applicable):

\_\_\_\_\_

Your company's headquarters location: \_\_\_\_\_

Is your company wholly owned or controlled by a Parent Organization?

Wholly owned \_\_\_\_\_ Controlled by a Parent Organization \_\_\_\_\_

If so, what is the name of the Parent Organization? \_\_\_\_\_

Where is your Parent Organization's headquarters located? \_\_\_\_\_

What are your annual company revenues or assets under management?

Annual Revenue \_\_\_\_\_

Assets Under Management (AUM) \_\_\_\_\_

Briefly describe what services you provide and/or solutions you offer:

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

What is your target market, and who are representative, current customers?

Target market:

\_\_\_\_\_

\_\_\_\_\_

Current, representative customers:

\_\_\_\_\_

What companies compete with you in your target market? (Please list up to five competitors):

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

5. \_\_\_\_\_

What differentiates your company from your competition? (Please list up to five attributes):

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

5. \_\_\_\_\_

### **For Public Relations Firms only:**

What is the name of your organization? \_\_\_\_\_

What are your contact details?

Name: \_\_\_\_\_ email: \_\_\_\_\_

What other organizations in the payments/banking industries does your firm represent?

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

**About Your Briefing Request:**

Please briefly describe what you currently know about Mercator Advisory Group:

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What would you like to accomplish during and after the briefing?

During the briefing: \_\_\_\_\_

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After the briefing: \_\_\_\_\_

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\*Please list your company's briefing participants and their roles/titles:

	<u>Participant</u>	<u>Role/Title</u>	<u>Contact Email and Phone Number</u>
1.	_____	_____	_____
2.	_____	_____	_____
3.	_____	_____	_____
4.	_____	_____	_____
5.	_____	_____	_____

Please list up to five dates and times your company's briefing participants may be available should your request be accepted:

	<u>Date: (mo/day/yr)</u>	<u>Time (Eastern US Time Zone)</u>
1.	_____	_____
2.	_____	_____
3.	_____	_____
4.	_____	_____
5.	_____	_____

Do you currently work with research and advisory firms? If so, please identify them here:

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Are you familiar with [PaymentsJournal](#), Mercator's analyst-driven information portal for the global payments industry? (Please check Yes \_\_\_ or No \_\_.) Would you like a PaymentsJournal representative to attend the requested briefing? (Please check Yes \_\_\_ or No \_\_.)

*\*Mercator will be pleased to add the participants to our mailing list to keep you informed of our latest strategic research, webinars, and ways to partner with Mercator and/or PaymentsJournal.*

***Briefing Request Next Steps:***

1. Please ensure all fields in pages 1 and 2 are completed. Incomplete forms that are submitted may delay your briefing request.
2. Once completed in full, please email your request to [info@mercatoradvisorygroup.com](mailto:info@mercatoradvisorygroup.com). Make sure to include the best telephone number to reach you as well as an email address which accepts replies.
3. Once received, your briefing request will be routed to the appropriate Mercator personnel. Please understand that due to the volume of requests received as well as the briefing schedule availability, it may take up to several business days before an acknowledgment is returned.
4. If your request is accepted, a Mercator and/or PaymentsJournal representative will contact you to schedule the briefing, to review pre-briefing logistics and address any questions that may arise on either side.
5. If your request is denied, a Mercator and/or PaymentsJournal representative will contact you to review the reason(s) why. Please know in advance there may be a variety of reasons, such as:
  - a. current schedule availability of the Mercator Analysts who match the requested briefing's coverage areas,
  - b. industry misalignment or lack of suitability of requestor's company solutions/services/target markets versus the current/planned research coverage, bespoke custom research/consulting services capabilities/directions, etc.

***Mercator Advisory Group welcomes your briefing request. If your submission is accepted, we look forward to exploring how you and your company serve your present and future markets. In turn, we also look forward to relaying how we help our Research Members, our Custom Research/Consulting Services Clients and those companies who are promoted on PaymentsJournal succeed with their various payments and banking industry missions.***

***Thank you for your submission!***