

ONLINE BROKERAGE RESEARCH SERVICES

Differentiate your digital experience to deepen online investor loyalty amid industry upheaval



How can you meet online investors' high expectations amid pressures from price compression to digital advice proliferation? We can show you.

Boost your customer experience and product positioning with analysis of best practices from leading online self-service and hybrid retail brokerages to help you establish a competitive edge.



MONITOR RESEARCH

Obtain a unique view of the competitive landscape including self-service and hybrid brokerage firms with our survey-backed qualitative research. Track competitor marketing initiatives and account capabilities for a full look behind the scenes.



DIGITAL AUDITS

Learn how your digital properties stack up against your key competitors'. Customized, in-depth benchmarking analysis will help uncover vital improvement opportunities along with strategic recommendations to reimagine the evolving user experience.

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CONSULTING SERVICES

Use customized benchmarking, quantitative research, emerging trend analysis and customer segmentation studies to perfect your user experiences and product positioning.



UX RESEARCH

Identify customer needs and pain points to steer design and development toward user-centered goals. Our expert reviews, personas, surveys and usability testing can help you establish distinct advantages.

BOOK A FREE CONSULTATION TO DISCOVER HOW OUR RESEARCH CAN HELP YOU GAIN A COMPETITIVE EDGE.



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