

TRADITIONAL BROKERAGE RESEARCH SERVICES

Stay ahead of the market by learning unique ways to differentiate client services



As brokers transition from advice to comprehensive planning, how can you give them an edge amid industry compression?

We can show you.

Elevate client engagement with in-depth analysis of best practices from leading retail brokerage firms. Establish solid roadmaps for challenges from shrinking HNW markets to digital advice proliferation



MONITOR RESEARCH

Obtain a unique view of the competitive landscape including self-service and hybrid brokerage firms with our survey-backed qualitative research. Learn how firms attract new clients, deepen relationships, and offer comprehensive financial planning.



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.

TRADITIONAL BROKERAGE RESEARCH SERVICES



CONSULTING SERVICES

Use customized benchmarking, qualitative 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.



INTEREST@CorporateInsight.com
646-887-3235
CorporateInsight.com