

DIGITAL ADVICE RESEARCH SERVICES

Learn how to differentiate digital advice experiences in an increasingly crowded landscape



As digital advice evolves, how can you instill investor loyalty amid market uncertainty? We can show you.

Drill down into competitive details with in-depth analysis of algorithmic-based investing platforms for a unique look at competitors' actual customer experience.



MONITOR RESEARCH

Our continuous research service offers a unique view of the competitive landscape, including digital capabilities, interactive tools and marketing initiatives. Track actual client and prospective digital journeys at leading innovative firms.



EXPERIENCE BENCHMARKS

Learn how your digital advice properties stack up against your key competitors'. Customized, in-depth benchmarking analysis will help uncover vital improvement opportunities alongside our strategic recommendations.

DIGITAL ADVICE RESEARCH SERVICES



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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