

INVESTMENT ADVISOR EXPERIENCE RESEARCH

Gain a unique view of the digital advisor experience at leading investment management firms



How do you build advisor loyalty through strategic content across digital platforms? We can show you.

Keeping investors engaged and invested during volatility and industry compression is an uphill battle for financial advisors. We provide an actual view of leading digital advisor experiences and materials including sales and practice management resources. Give your advisors an edge by going beyond what the competition offers.



MONITOR RESEARCH

Obtain a unique view of the educational content, digital capabilities and interactive tools that leading firms provide to advisors. Track actual marketing programs and advisor-centric resources for a full look behind the scenes.



EXPERIENCE BENCHMARKS

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 advisor experience.

INVESTMENT ADVISOR EXPERIENCE RESEARCH



CONSULTING SERVICES

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



UX RESEARCH

Identify client 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