

ADVISOR TOUCHPOINTS™: 2011

Best Practices for Building an Optimal Communications Strategy

Cogent's Advisor Touchpoints™ explores the impact of both push and pull marketing on key metrics including loyalty, satisfaction and share of wallet. The report evaluates the current performance of individual firms, identifies "best-in-class" providers on key touchpoint elements, and recommends optimal touchpoint, communication, and distribution strategies. In addition, we examine internal and external wholesaler support including an analysis of the drivers of satisfaction.

This report will help executives

- Identify brands that have created the strongest connections with advisors by product type (mutual fund, ETF, and variable annuity)
- Benchmark current mutual fund, variable annuity, and ETF industry standards in communicating with advisors
- Understand advisor preferences for communicating with product providers and how advisor needs differ by distribution channel and key demographics
- Explore emerging methods of advisor interaction and communication

Areas of Inquiry

Industry Benchmarks of Advisor Touchpoints

- Identify the most effective frequency and method of communication

Brands with the Strongest Advisor Connection

- Rank top mutual fund, ETF, and variable annuity providers

Internal and External Wholesaler Support

- Analyze perceptions of mutual fund, ETF, and variable annuity wholesaler support
- Uncover key drivers of wholesaler support satisfaction and rate the top mutual fund firms on each driver

Social Media and Online Support

- Learn which social media sites advisors use, what tasks they conduct, and what they looking for from product providers
- Rank providers websites and understand what they are looking for when they visit

Media and Advertising Landscape

- Find out what print publications and websites advisors read and trust

Mobility

- Identify the specific benefits of a wholesaler using mobile technology in advisor interactions

Methodology

Data collected via a web-based survey of a representative sample of 500 advisors with an active book of business of at least \$5 million in assets. Data was collected in June 2011.

Deliverables: September 2011

- Detailed PowerPoint report
- 3 hardcopies of the study (including a summary of findings)

Research Investment: \$9,500

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