

In-Depth Insights from Financial Advisors Across the US

A leading market research firm conducted a study involving 450 financial advisors in the U.S. to gain insights into the financial advisory landscape.

OBJECTIVE & KEY FINDINGS

• Advisory Needs & Challenges

Identified key challenges such as client management, regulatory compliance, and investment strategies.

• Product & Service Preferences

Revealed the most valued products and services, including financial planning tools, investment products, and technology solutions.

• Decision-Making Factors

Uncovered key influences in product and service selection, like cost, performance, ease of use, and customer support.

• Future Trends

Forecasted upcoming trends like digital tool adoption, changing client expectations, and regulatory impacts.



IMPACT



PRODUCT DEVELOPMENT

The data guided the creation of new products and improvements to existing ones, tailored to the needs of financial advisors.

TARGETED MARKETING CAMPAIGNS



Enhanced understanding of advisor preferences led to targeted marketing strategies, boosting engagement and conversion rates.



COMPETITIVE ADVANTAGE

The firm improved its understanding of the competitive landscape in financial advisory, helping clients refine market positioning and value propositions.

BENEFITS FOR OUR BRAND PARTNER

- Has been able to leverage their pricing strategy more effectively to selected groups.
- Has identified industry sectors where their product has achieved increased traction.
- Saw an opportunity to grow during a time of rising budgets in their end.
- Engaged in new strategic partnerships.

CONCLUSION

By utilizing extensive market research, the firm made informed decisions that enhanced its products and marketing strategies. The project involved 450 financial advisors in the US and was crucial for the firm's growth in the competitive financial services market.

NEXT STEPS

The firm aims to continue its research initiative to stay current with trends and enhance its competitive edge. Future projects will broaden the scope to include more segments in financial advisory and explore new geographic areas.



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