

**NEW**

# Wealth Management Digital Experience Study<sup>SM</sup>

Available in the U.S. & Canada



DISCOVER

Evaluates individual investor satisfaction with wealth management mobile apps and websites. Identifies opportunities to improve the mobile wealth app and website experiences for personal brokerage clients. Combines quantitative and qualitative survey feedback with expert UX assessment of site features and navigation

## VALUE STATEMENT

We pinpoint the factors that matter most to investors using digital channels and what drives their satisfaction. Using this data, we set a quality benchmark for the industry, and provide a thorough understanding of the digital needs, expectations, and desires of today's full-service and self-directed, investors.

## EXPERIENCES EXPLORED

- Information/content
- Navigation
- Speed
- Visual appeal

## SUBSCRIPTION DELIVERABLES

- Customized executive presentation and strategy session that gives you data-driven, actionable recommendations for achieving your strategic business goals
- Data and analytical tools for performance insights and competitive comparisons including access to PowerSource
- Executive Overview Dashboard
- Detailed Results Dashboard
- Cross Table Tool
- Verbatim Comments
- Executive briefing document highlighting key trends and insights across the industry
- Brand-level scorecards benchmarking each profiled company's performance compared with the industry across key drivers of satisfaction, loyalty and advocacy metrics
- The complete study data file with consumer survey responses