

ADVISER INFLUENCE GUIDE

A MOLECULAR ANALYSIS OF PROVIDER & PLATFORM BUSINESS AND TECHNICAL SUPPORT

IMPROVING THE EFFECTIVENESS AND EFFICIENCY OF YOUR ADVISER FACING ACTIVITY AND THE RESULTING BUSINESS OUTCOMES, THE ADVISER INFLUENCE GUIDE:

- ➔ Identifies the levers of business and technical support that will have the biggest positive impact for you in the adviser market.
- ➔ Clearly benchmarks your brand against a) your competitors across support imperatives and b) average market spend and resource allocation in each area.
- ➔ Points clearly to the optimal blend of support services (content and delivery) required to meet and exceed your business objectives with the advisers you want to do business with.
- ➔ Enables you to plan and deploy resources more scientifically and with greater confidence that they will deliver the desired outcomes.

We will point clearly to how you can tailor propositions, services, support and communications to help secure business.

PERFORMANCE MEASURED IN 15 KEY AREAS	
CONSULTANT SUPPORT	Availability / responsiveness
	Technical expertise
	Problem resolution
	Business generation ideas
	Practice development support
CENTRAL SUPPORT	Likeability
	Telephone responsiveness
	Email responsiveness
CENTRAL RESOURCE	Technical expertise
	Problem resolution
	Events
	CPD support
	Online content
Online tools	
Support materials	

DELIVERABLES



100 DEPTH INTERVIEWS WITH TARGET ADVISERS



FULL REPORT




FACE-TO-FACE DEBRIEF




USE OF DATA FOR COMMS / PR SUPPORT

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