

A Fortune 100 financial services firm leverages reports from Corporate Insight to gather **actionable recommendations** for providing a **better user experience** for its clients.



SITUATION

Founded more than 100 years ago, a Fortune 100 financial services firm offers clients investment and banking options designed to increase their confidence in retirement. Seeking an edge, the firm requires access to competitive intelligence and customer experience research—information that the firm's Director of Platform Strategy deems "critical."

"If we don't have that type of information it would be difficult for us to keep up with, or stay ahead of, our competitors," said the Director of Platform Strategy.

For instance, if the Director of Platform Strategy had data that identified more secure website login authentication as an emerging trend, he would be in a strong position to recommend that the firm invest more heavily in improving the security of its website and its clients' personal information.

To gain access to this type of information and analysis, the Director of Platform Strategy reached out to Corporate Insight.

SOLUTION

Since first hearing about it fifteen years ago, the firm's Director of Platform Strategy has come to recognize Corporate Insight as a reputable research company that has a deep understanding of the digital customer experience in his industry. That made the decision to subscribe to Corporate Insight's reports an easy one.

"Corporate Insight uses a subscription model that works well for us," said the Director of Platform Strategy. "The package we have gives us access to a series of reports discussing topics like banking, insurance, brokerage, and retirement." **(CONTINUED)**

CASE STUDY



Corporate Insight Research Services is a **respected source of quantitative and qualitative research.** It represents the current state of the art that helps save us time and effort. Working with the Corporate Insight team is a **good investment.**"

Director of Platform Strategy



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SOLUTION (CONTINUED)

One thing that Corporate Insight brings to the table is the ability to dig deep into the websites of the firm's major competitors. This gives the Director of Platform Strategy a deep understanding of the digital customer experience across all financial sectors relevant to his company.

"Now, we are smarter and able to speak with greater authority," said the Director of Platform Strategy. "For example, Corporate Insight might tell us that retirement plan participants are X times more likely to go online to use services when the log-in process is an easy experience. Because this information is coming from a respected third party, we can quote them knowing that they give us credibility."

The firm's Director of Platform Strategy now gets a robust flow of information. However, he knows that

information is good, but analysis is better. That's why he likes that Corporate Insight uses clearly defined criteria and a carefully weighted rating system to illustrate best practices and recommend ways to help him build a better user experience.

"Alternatives...don't offer the same level of thoroughness of research and frequency of publication as Corporate Insight."

"There are alternatives out there, but the downside with them is that they don't offer the same level of thoroughness of research and frequency of publication as Corporate Insight," said the Director of Platform Strategy.

BENEFITS



Receives Actionable Recommendations

"We go through every report we receive with a fine-toothed comb," said the firm's Director of Platform Strategy. "Then, we take excerpts and build executive summary reports that clearly communicate to our executives what the research recommends."



Saves Money

"If I had to commission a research project, I'd have to make an investment and allocate money to hire market research specialists," said the Director of Platform Strategy. "That means pulling resources from other things I might be working on."



Saves Time

"Conducting such extensive research in-house would take an enormous amount of time," said the Director of Platform Strategy. "With Corporate Insight, we simply search for the information we need, and it's right at our fingertips."



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