



DALBAR



Trends & Best Practices: On the Web

A graphic of a globe showing the Americas, set against a blue background with a grid pattern.

BACKGROUND

The digital age has dramatically changed how, where, when and with whom consumers shop for and ultimately purchase financial services.

Not only are shoppers better informed about their options than they have ever been before, their increased presence online means that consumer expectations of what constitutes an impactful online experience is constantly shifting.

So, what can financial services firms do to stay competitive in this rapidly changing digital landscape?

Like the consumers shopping around for financial services, providers also need to know what digital features their peers are deploying and which features are resonating with shoppers during their online journeys.

With DALBAR's *Trends and Best Practices: On the Web* your digital team can focus their resources on creating compelling, competitive and insight-driven digital experiences for clients and prospects alike. Not only do firms who use this report stay on top of the latest trends in the market, they are better able to strategically position their service offerings and avoid costly missteps.

ABOUT THE REPORT

DALBAR's *Trends and Best Practices: On the Web* will include:

- ✓ **New and Improved Functionality:** What can be done now that couldn't be done five years ago?
- ✓ **Website Security:** What actions are firms proactively taking to build and sustain user confidence?
- ✓ **Engagement:** Internet users expect nothing less than to have their say; how are financial services Web sites accommodating that expectation?
- ✓ **Relationship Building:** Keeping the human connection alive; what are firms doing to create positive emotional connections with visitors?
- ✓ **Limiting Decision Making:** What tactics are used by firms to avoid information overload; keeping that balance between too few and too many options?
- ✓ **Standardization:** Are financial services sites falling in line with the universal standards with which visitors have become familiar?
- ✓ **Presentation of Content:** Is content presented in a manner that supports how Web site visitors consume information?
- ✓ **User Experience:** Are Web sites designed with the user's needs in mind, or are they driven by self-promotion?



- ✓ **Organization:** Does Web site organization support visitors' ability to quickly access what they seek?
- ✓ **Mobile Usage:** Is it possible? Is it seamless?

This report will identify those firms and specific features that stand out in creating effective digital experiences for consumers.

TIMEFRAME AND COST

Trends & Best Practices: On the Web will be available within Quarter 4-2018. The report is available for purchase at \$4950.

CONTACT INFORMATION

Reserve your copy of the report today by contacting Shelley Eramo at seramo@dalbar.com. Feel free to contact us with any questions you may have about this report.

About DALBAR

DALBAR, Inc. is the financial community's leading independent expert for evaluating, auditing and rating business practices, customer performance, product quality and service. Launched in 1976, DALBAR has earned the recognition for consistent and unbiased evaluations of investment companies, registered investment advisers, insurance companies, broker/dealers, retirement plan providers and financial professionals. DALBAR awards are recognized as marks of a superior standard of care in the financial community.