Connect With Your Ideal Market

Optimise market spend and increase sales

AR data

Powered by Adviser Ratings

Contents

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Traditional distribution channels are rapidly diminishing and having a substantial impact on sales volumes. The rise in private licensees has resulted in a fractured distribution network, increasing the hurdles to connect with advisers. New entrants to market, and low product differentiation adds even more pressure to this difficult environment. Understanding how data integrity is used to segment and attract advisers is required to begin hitting targets again.

Using the combined strength of unique trusted data, technology and innovative analytics, Adviser Ratings has grown from a consumer ratings company into a leading provider of insights and knowledge. We specailse in helping the financial services ecosystem make better informed decisions by assimilating and analysing data on more than 21,000 advisers and 2,100 licensees Australia wide.

I'm confident the AR data suite of products can help you stay ahead of these increasing market difficulties. Our data can help your company connect with your ideal market, optimise your marketing spend, and importantly increase sales.

Angus Woods, Founder

Data Driven Marketing

> *Make informed segmenting, targeting, and messaging decisions to optimise marketing spend and boost adviser engagement.*

Marketing managers need to have a clear understanding of their target audience. Having a rich understanding of customers and prospects is critical to the development of effective targeting and messaging, and optimising return on marketing investment. All too often, marketers are forced to make critical decisions on the basis of limited information such as anecdotal feedback or inadequate market research, leading to decisions being made by 'gut feel'.

The Insights Library offers quality data to help produce your own insights delivering the ability to create personal relationships at scale.

"Using Adviser Ratings data provides us the confidence to communicate directly with advisers and ensure our data is effectively maintained."

Stuart Clements
*Head of Strategic Partnerships and Growth
QSuper*

Traditional

1x

Generic message

Whole database

Average conversion

Data Driven Marketing

A

Unique message

B

Unique message

C

Unique message

Segmented Audiences

Higher conversion

How it Works

The Insights Library contains a wealth of information about advisers – from basic demography, such as age and gender, through to more complex elements, such as styles of business and ideal market types. This information is presented as a series of data variables, which are used as 'building blocks to develop avatars of ideal clients.
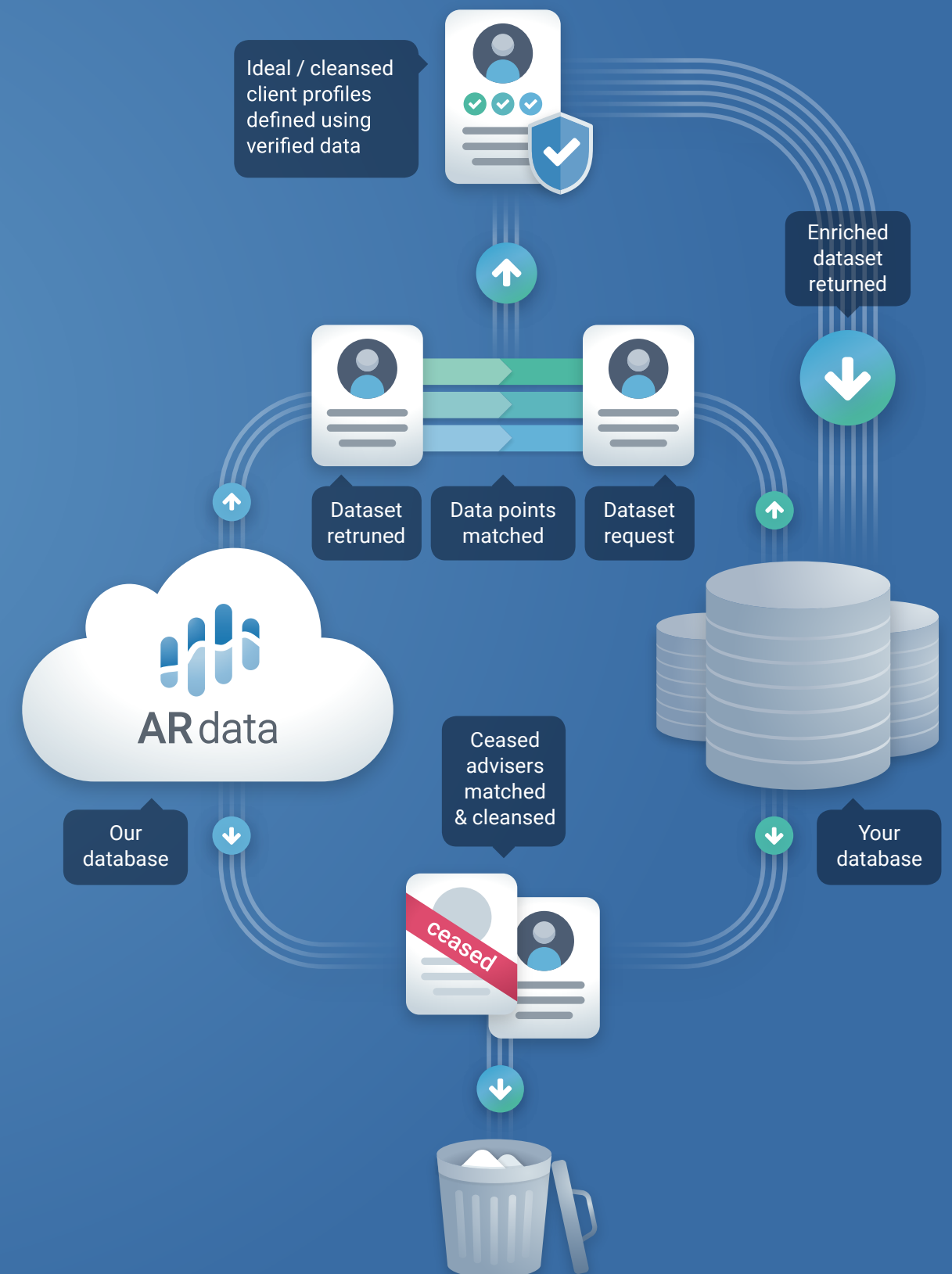
The Insights Library can be automatically linked to your existing customer data by combining the AR data datset with your own in-house data. This provides the ability to take the insights of your defined target audience to the next level and create a powerful marketing toolkit, cleansing ceased advisers out of your database at the same time.

Any combination of the Insights Library elements can be rapidly matched to your customer records using our internal data science expertise to identify and match the datsets, and deploy back to you as enhanced flat files linked to your internal unique identifiers.

"Adviser Ratings has helped us scale. At a particular time now, where we're seeing so much movement in the industry, to be able to have that real time data at our fingertips, to perform our marketing and sales activities has been fantastic. We're really a partnership with Adviser Ratings."
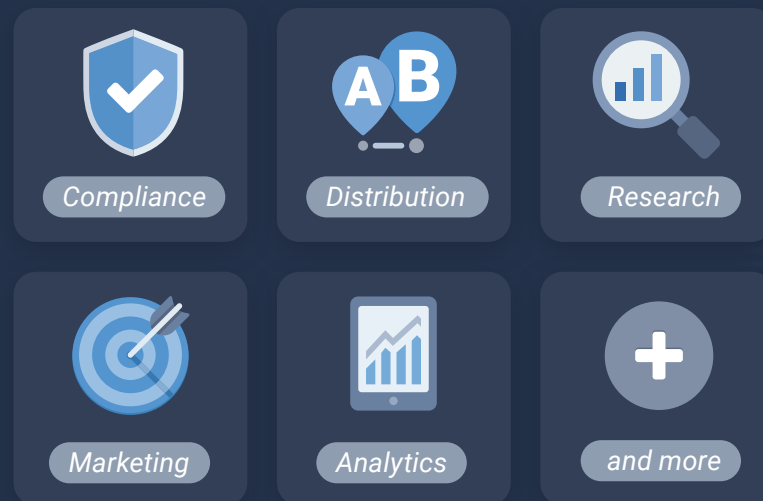
Angela Maxwell
Senior Marketing Manager, ASX

Ideal / cleansed client profiles defined using verified data

Enriched dataset returned

Dataset retruned

Data points matched

Dataset request

AR data

Our database

Ceased advisers matched & cleansed

Your database

ceased

A Wealth of Information

The Insights Library contains information about advisers ranging from basic demography, such as age and gender, through to more complex elements, such as styles of business and ideal market types.

Compliance

Distribution

Research

Marketing

Analytics

and more

"Magellan has chosen Adviser Ratings as one of our preferred data and insights partners for our retail wealth management business. We are impressed with the innovation they are bringing to the advice industry at this time of significant disruption. As an asset manager, we want to have the most up-to-date information on the adviser community so we can optimise our reach to current and prospective clients. Adviser Ratings helps to solve this challenge."

Frank Casarotti
GM Distribution,
Magellan

ARdata

Licensees

Preference Data

- Licensee type
- Number of advisers
- Gender ratio
- Education requirements
- Number of clients
- APL Investment and Super
- Funds under advice
- Platforms
- Software
- Research house

Licensees

People & Place Data

- Licensee Name
- AFSL
- ABN
- Owner
- Address
- Website
- Licensee Social Media
- Funds under advice
- Key contact information
- Platforms
- Software
- Research House

Practices

People & Place Data

- Practice Name
- ABN
- Address
- Website
- Key Contact name
- Role
- Email & Phone
- Social Media accounts

Practices

Preference Data

- Practice type
- Number of advisers
- Gender ratio
- Education requirements
- Number of clients
- Demographics of client base
- Funds under advice
- Inforce premiums
- Minimum Investment level
- Minimum income level
- SMSF proportion
- Expertise areas
- Platforms
- Software
- Research House
- Product Authorisations
- APL Investment and Super

Advisers

People & Place Data

- ASIC ID
- Name
- Email
- Practice
- Practice ABN
- Licensee
- Licensee Owner
- Address
- Phone
- Social Media account

Advisers

Preference Data

- Gender
- Years of Experience
- Ratings
- Adviser Type
- Adviser Conduct (Bannings & Disqualifications)
- Employment History
- Qualifications
- Memberships
- Number of clients
- Demographics of client base
- Funds under advice
- Inforce premiums
- Minimum Investment level
- Minimum income level
- SMSF proportion
- Expertise areas
- Platforms
- Software
- Research House
- Product Authorisations
- APL Investment and Super

Use Case:

Anticipating adviser movements

A leading investment platform understood their ideal market quite well, using several data points to anticipate where adviser movements would occur. But as their need to grow continued to build, these data points did not operate effectively enough to continuously source qualified leads. As such, competitors were able to capture ground by anticipating these movements earlier.

While this non-aligned company had done well to acquire new advisers, they had identified advisers leaving aligned licensees for private licensees as the best niche for them to focus on. AR data was introduced to help identify addition data points to build out the effectiveness of the propensity modelling. Using proprietary data, additional common trends were identified to provide enhanced predictive analytics.

The company now benefits from a more accurate and effective database with a larger cohort of advisers they consider to be of high interest. Using better predictive analytics, the pool for their ideal market has now grown, and more advisers are able to be approached earlier in sales cycle. As the adviser market fluctuates to such a high degree, advisers fall in and out of this ideal market quite rapidly. AR data works with this company to consistently identify new prospects to ensure their strong growth continues.
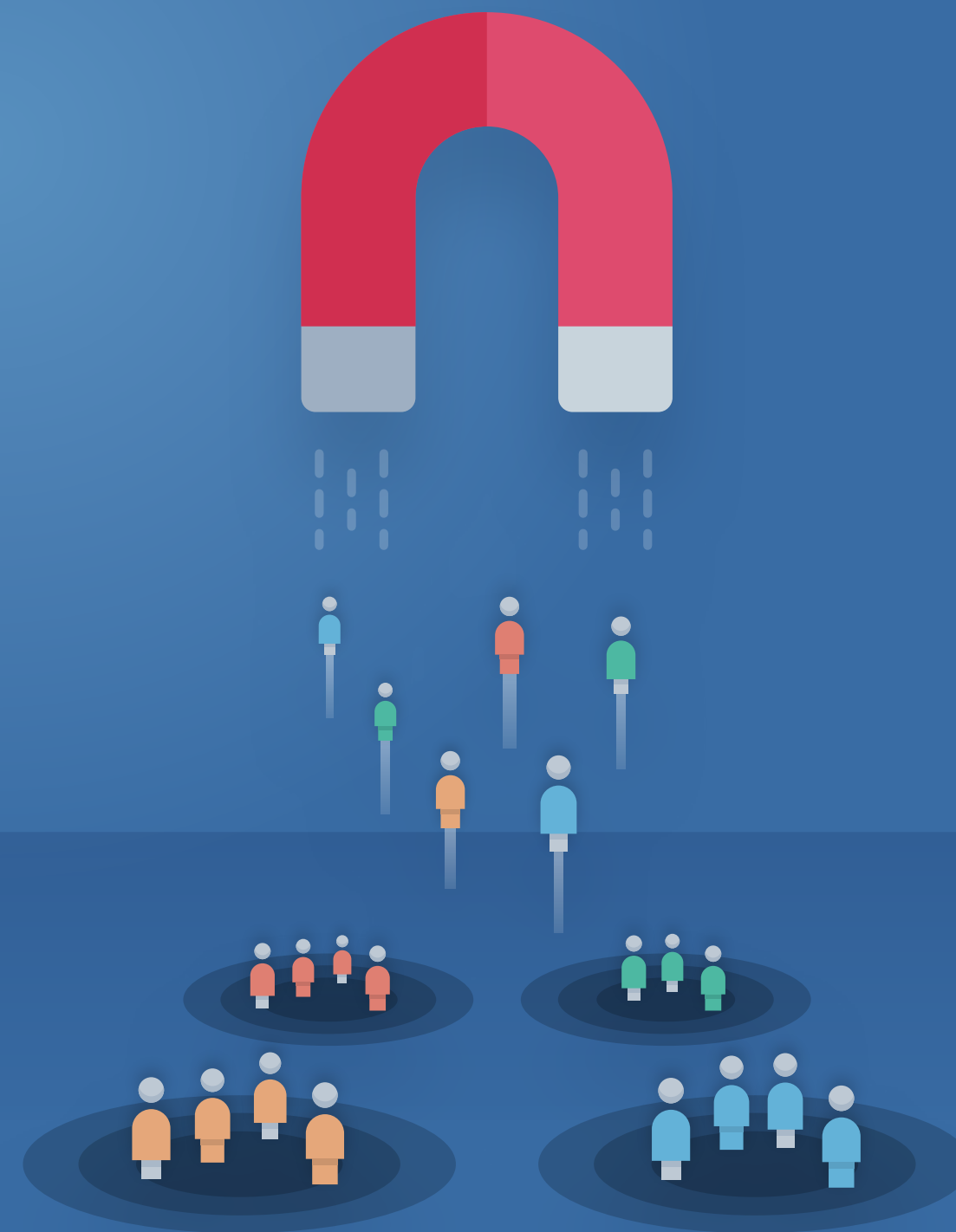
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