

Client



Engaging audiences to ensure sustainability

Company:
Clerical Medical

Website:
www.clericalmedical.co.uk

"This is the first research I've seen that has been able to make a really clear link between perceptions of how we're doing and the bottom line. The findings are incredibly compelling and have really made us sit up and take note. It's great to see how everything we're doing works together and contributes to the overall relationship with our intermediaries."

Managing Director, Clerical Medical

Synopsis

Clerical Medical is one of the UK's leading providers of pensions and long-term savings products, distributed via independent financial advisors.

Challenge

Beyond using research to understand in-depth the type and quality of relationship Clerical Medical had with its distribution channel, the brief also stipulated that the research should engage audiences to ensure buy-in and sustainability of the approach across the business. We also had to establish a clear and unequivocal link between business profitability and the quality of the intermediary relationship.

Our contribution

Before any research was undertaken, we went through a thorough internal immersion to identify the desired IFA 'behaviours' that would lead to growth for Clerical Medical. These then underpinned a series of integrated research assignments from intermediary case studies to facilitated sessions where Clerical Medical and its highest value intermediaries tackled problems together. In addition, a tracking study was developed to understand both hard measures of performance as well as softer relationship driven factors.

Results

The research made quantified links between the quality and depth of relationship and volume of business placed with Clerical Medical. This was made possible by linking all intermediary feedback from the quantitative research to internal data on volumes of business placed with Clerical Medical and competitors. This created the business case for re-focusing on and reassigning internal resources to improving the intermediary experience.

While the Market Research Society judging panel on Alterian's award-winning entry to the Research Effectiveness Awards commented, "This project led to actionable business solutions and had a real effect on the bottom line."

Alterian

Alterian (LSE: ALN) enables organizations to create relevant, effective and engaging experiences with their customers and prospects through social, digital, and traditional marketing channels. Alterian's Customer Engagement solutions are focused in four main areas: Social Media, Web Content Management, Email, and Campaign Management & Analytics.

Alterian technology is utilized either to address a specific marketing challenge or as part of an integrated marketing platform, with analytics and customer engagement with the individual at the heart of everything. Working alongside a rich ecosystem of partners, Alterian delivers its software as a service, or on premise. For more information about Alterian visit www.alterian.com or the Alterian blog at www.engageingtimes.com.

UK & European Headquarters

Alterian
UK
T +44 (0) 117 970 3200
F +44 (0) 117 970 3301

North American Headquarters

Alterian Inc.
USA
T +1 312 704 1700
F +1 312 704 1701

Asia-Pacific Headquarters

Alterian
Australia
T +61 (2) 9968 2449
F +61 (2) 9968 1163

Continental Europe Headquarters

Alterian
The Netherlands
T +31 (0) 35 625 7890
F +31 (0) 35 625 7899