
How Jackson National uses iPads to compete

By Editorial Staff *Thu, Dec 4, 2014*

“At the beginning of this year we started giving our wholesalers iPads instead of laptops,” said Jackson vice president Luis Gomez. “As they visited advisors and went through their stories on the iPads, the advisors started asking, ‘Is that available for me?’”

Jackson National Life has begun offering free apps that advisors with iPads can use to access information about Jackson products (the Jackson app) and educational materials about retirement (Retirement Hub). Both apps can be downloaded at the Apple iTunes App [store](#), according to a Jackson release.

The digital tools are part of a new Jackson educational campaign for advisers and clients. The company wants to make it easy for advisors to download Jackson product information and general investing information to tablet computers for presentations.

An app is more than just a shortcut from an iPad to a website; it allows for downloadable content that can be used when there’s no internet connection. And that’s apparently a significant difference.

“There’s definite value to having the publication reside on the iPad versus having to rely on WIFI,” Luis Gomez, vice president of Marketing Strategy for Jackson National Life Distributors, told RIJ. “You can’t always rely on the WIFI. If you’re in the middle of a presentation, you don’t want skips. You want reliability.” Once an app is built, he added, it’s easy to change the content or add animation without going through the process of building an entirely new app.

Not all advisors are equally adept with tablet computers, but Jackson’s own adoption of iPads has evidently sparked advisor usage. “At the beginning of this year we started giving our wholesalers iPads instead of laptops,” Gomez said. “As they visited advisors and went through their stories on the iPads, the advisors started asking, ‘Is that available for me?’

“So we started making the apps available to advisors. From a marketing perspective, it helps reduce time to market. We can update materials and launch in real time, instead of having to go to print. We look at this as a competitive advantage. Other industries already have this, but the financial services industry overall is still playing catch-up. We’re trying to stay ahead of the competition.”

According to a release, Jackson is making the information in the apps “easily digestible” and

tailoring it to each client's "specific knowledge level" and "unique investment goals."

The Retirement Hub will be refreshed with new educational content each quarter, the release said. The first installment will cover bonds and interest rates, and how bond investors can adapt to rising interest rates. This quarter, the Retirement Hub will also explain portfolio volatility, and the role of correlations between asset types in controlling volatility.

Jackson also recently launched a redesign of the Performance Center on Jackson.com, where users can find current data from Morningstar, Inc. on the performance of the subaccounts in Jackson's variable annuities.

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