

Marketing Online Education To Advisors

By Ben Pousty, Corporate Insight Thu, Sep 24, 2009

Our latest research shows that dynamic displays, such as Flash interfaces, offer firms engaging new ways to present and market online educational content to advisors.



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For annuity providers, marketing products and educational features to advisors often comes down to making the most of the limited space their respective websites offer. After all, there is only so much real estate to work with on a website, and firms are continually trying to find the right balance between product information and key advisor resources, such as educational content.

In recent years, we have noticed that many of the firms we track have begun to use Flash-based microsities - autonomous websites accessible exclusively behind the login from the advisor website - to promote educational content. Flash is an ideal format for promoting educational content, allowing firms to incorporate vivid images and eye-catching animations and videos into their sites. In short, microsities are a great way for firms to draw advisor attention to educational materials without sacrificing valuable space on the advisor website.

Most Flash-based microsities feature creative themes and pages loaded with bright colors, vivid imagery and interactive features that engage the user. In many cases, sales materials, tools and informational content found on the advisor website are repackaged and integrated into the microsite. This practice gives preexisting advisor resources added exposure.

Over the past year, John Hancock and Prudential have both launched notable microsities. John Hancock's Advisor of Choice was one of the first education-focused microsities we encountered. The theme was self-improvement, offering advisors a variety of resources to help meet clients' retirement income needs.



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An animated promotion at the top of the Advisor Of Choice microsite leads to a recently released sales tool, the Client Communications Calendar. A variety of sales literature, including product brochures,

prospecting letters and sales ideas, are presented at the center of the page along with a risk tolerance questionnaire and retirement income calculator. A series of links at the bottom leads to an assortment of sales materials and tools found on the advisor website.



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In March of this year, Prudential released a microsite titled Capture An Annuity’s Highest Daily Value, which focuses on the firm’s new line of Highest Daily (HD) optional living benefit riders. The microsite is stunning, featuring a series of large, vibrant rotating Flash images at the top and an attractive color scheme. An abundance of product information is provided to advisors highlighting key product features and selling points. Hypothetical performance data and marketing materials are also available on the microsite.

As annuities continue to grow in popularity, keeping advisors up to speed on new products and regulations remains one of the industry’s main challenges. Over the past few years, we have seen a great improvement in the quality and quantity of online advisor annuity education content. Firms are not only offering more detailed product information, but also making a greater effort to educate advisors about suitability, regulatory matters, account opening procedures and sales techniques.

Despite these advancements, surveys continue to show that many advisors, particularly those who have been in the business for many years, still do not utilize online educational resources on a regular basis. Thus, it is important that online education content continues to be aggressively promoted on advisor websites. Firms must build upon their recent advancements in Flash marketing and strive to find innovative new ways to capture the attention of advisors.

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