Year In Review

Dec. 22, 2017

Our best year yet, in every way; it just keeps getting better. We couldn’t have asked for more. Here’s a recap of what 2017 looked like for AdvisorStream. Many new features, new partnerships and a lot of listening to our clients feedback. Throughout the past year, we have rolled out new features that have become huge value-adds for our subscribers.

Reports that present our users with powerful communication insights

We were extremely excited this year to announce the release of the Reports Dashboard. A powerful tool that provides users with invaluable and actionable information into the content that resonates with clients and prospects. The dashboard feature allows users to measure their digital marketing initiatives by learning what their clients and prospects are opening, viewing and sharing to specifically target new account opportunities. By consolidating and displaying information in an all-in-one dashboard, users are able to assess client / prospect engagement to better target their efforts. There are many ways advisors are leveraging this information to support and grow their business including creating call lists, prepping for appointments, collaborating with centers of influence, creating targeted communications and asking for referrals or introductions. By monitoring client engagement, advisors are able to deepen client relationships, nurture leads and find new business within their existing client base.

Amazing Support. Guaranteed!

One of the ways we measure our success is by ensuring that the people that use AdvisorStream are happy and satisfied. This year our client success and support team saw huge growth and tripled in size. That means more people dedicated to supporting and assisting our users meet their digital marketing goals. We believe in customer service by humans, we value and build trust with our customers and offer responsive, personalized, support. This year our team solved over 956 support cases with 85% of tickets solved within a 1-hour response rate; that’s over 8x times faster than the industry average!

Ghostwritten Content to Further Build Your Thought Leadership

Building your thought leadership is amongst our top priorities. With this in mind our team worked hard to secure a partnership with a niche agency firmly entrenched in the financial services sector to expand our content offering by including Ghostwritten Content. How does it work? They're articles that are written by industry professionals, you're the author. We work with the best authors to provide high-quality, relevant pieces written for specific topics you want your clients and prospects focused on. Users can expect to see a number of articles made available on a variety of evergreen topics helping advisors to further build their thought leadership and provide them with a a method to steer your clients towards topics you want them to focus on.

In an attempt to further meet users' needs, we are in the process of expanding our ghost-written content offering to include a new service - Bespoke Ghost-Written Content. With this, users will be able to have articles written that meet their exact needs. Leveraging such bespoke content alongside articles from leading content publishers serves to further position our users as authorities within their network.

Sleek & Intuitive New Design

AdvisorStream has improved the way users manage their contacts within our service. Our goal was to empower our users to effectively segment their contacts into targeted lists. From the sleek redesign of the contacts user interface, to making functionality like bulk deleting, moving and adding contacts to lists is much easier. We wanted to make importing contacts intuitive and efficient so users can get up and running in our platform quickly, allowing them to begin communicating with clients and prospects sooner. We've even created a few "How to Videos" to help users better learn the new features.

Perfect Balance Between Automation & Control

Experience the perfect balance between automation and control, with AdvisorStream's new 'Automated Queueing & Semi-Automated Queueing' features for social media. We do all the hard work, and leave the decision making up to you. We understand that it's hard to find the time to focus on executing your digital marketing strategy. It's for that exact reason that we've taken the time to develop a solution specifically designed to curate and distribute quality content in a more automated fashion while still giving you multiple levels of control to review the content before posting or sending. We do the suggesting based on your preferences and you call the shots with a click of a button; it's that simple.

An Integration Partnership That Works Synchronously with Redtail

We understand that integrating with a financial advisor's CRM saves significant time and resources, while also giving the power to send more strategic, targeted communications. It's for that reason that we were excited to integrate with the most widely used CRM created by advisors; Redtail. Our new partnership makes it possible to seamlessly upload contact information without advisors having to do any additional work. Now, contacts and any segmented lists are automatically transferred from RedTail to one's AdvisorStream contact segments. The goal of partnering with Redtail was to allow advisors to easily segment contact lists, and limit the work involved in preparing, exporting and uploading their contacts. This new partnership will enable AdvisorStream to further assist advisors to send the most relevant targeted communications to the right client or prospect at the right time, helping them grow their business.

A Robust Compliance Toolset

The incredible growth we've experienced the past year is most exciting! By working closely with compliance departments at over 250 firms we've been able to ensure our platform meets the various, and often complex compliance requirements of several of the largest advisor networks in North America. This year we launched even more tools to our robust Compliance Dashboard, which provides advisors the ease of working within their compliance and ad review guidelines. The integration provides streamlined workflows to eliminate unnecessary communications between compliance and advisor. With the new Compliance Dashboard, users will automatically be provided with archiving, newsletter and social media posting approval as well as in-system communication tools. Our growing publication powered content marketing platform also allows compliance officers to approve and monitor an advisor's profile, brand, connected social media, and website before beginning to communicate with clients and prospects to ensure ongoing accuracy. The Compliance Dashboard provides customizable workflows that allows broker-dealers to configure compliance rules around their own unique guidelines.

"When it comes to client communications, compliance approval has always been a hurdle for any broker-dealer. That's why we've built our Compliance Dashboard: To work within expanding guidelines with broker-dealers that have systems in place to allow advisors to market themselves online. Current technologies are so fragmented that it becomes a major headache for compliance and financial advisors to be on the same page. Our Dashboard allows us to integrate with broker-dealer's current systems providing email tracking/archiving, compliance with social media systems and of course website requirements." says Kevin Mulhern, CEO of AdvisorStream.

Our goal here is to provide a solution that helps financial advisors who may not have ventured into digital marketing for a myriad of compliance or technological reasons. In such a heavily regulated industry, there are risks associated with marketing yourself using online communication channels - having the proper safeguards in place is critical.