

**INSIGHTS THAT
DELIVER A
HIGHER RATE OF
GROWTH.**



The financial services industry is undergoing dramatic shifts in its business models, customer strategies, and digital innovations.

No longer do single products or one-off transactions fuel growth. Financial brands need to build integrated, personalized, and holistic experiences to grow at scale and speed. The goal is to drive customers to your brand as a destination for all their financial needs.

Leading financial services brands partner with Radius Financial to strengthen relationships with personal, commercial, and institutional audiences. Our team of financial insights experts are deeply experienced in guiding growth initiatives for banks, insurance, investment, and fintech organizations. Many of our team members have worked within these financial firms and know how to identify brand growth opportunities.



Radius Financial can skillfully help your brand team reimagine business models, refine customer strategies, develop bold innovations, and deliver business-building analytics. We currently serve 20+ leading financial brands, and all projects are led by vice presidents with 15+ years of sector experience.

At the core of our research is a mixed methodology approach that combines sophisticated data science and cutting-edge immersive techniques. Radius Financial delivers insights that impact your customer relationships and bottom line.



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Glenn Staada
SVP, Radius Financial Lead



We are one of the top custom market research companies that offers both qualitative and quantitative talent for financial services brands.

100+

projects annually

1,000+

global qualitative sessions
annually

15,000+

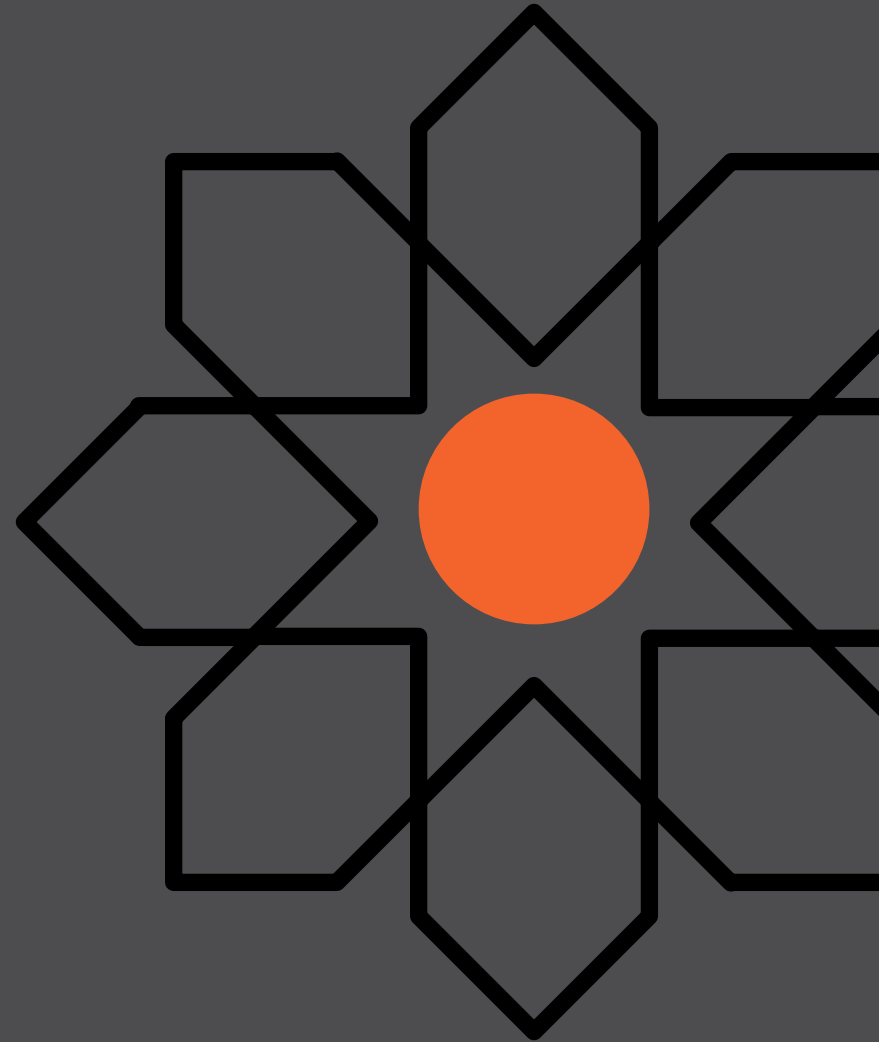
global quantitative interviews
annually

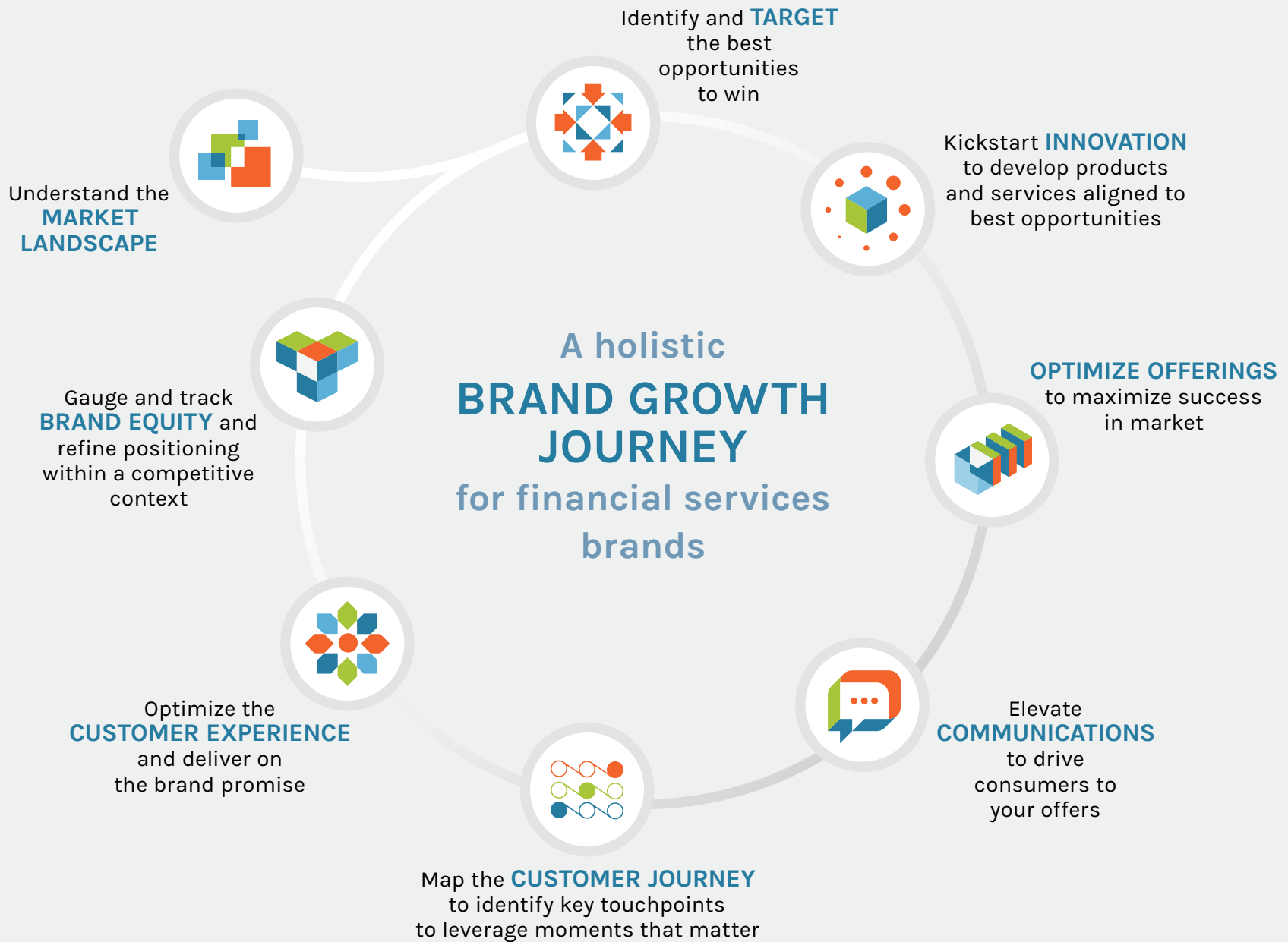
25+

brand tracking studies
annually

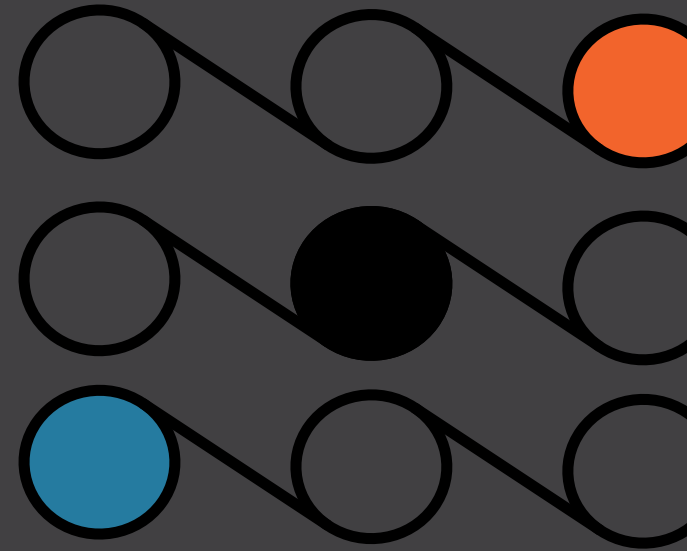
A clear path to **brand growth.**

Our proprietary Brand Growth Navigator is our framework to guide brand teams on business, product, and marketing strategies. We offer holistic research approaches that provide customer insights on the strategic issues most relevant to your brand's lifecycle and growth priorities.





Guiding financial brands on their growth journey.



On the following pages are examples of how we've guided clients on these strategic brand issues:

Identifying digital opportunities.

Increasing marketing effectiveness.

Understanding the credit card journey.

Optimizing the communication platform.





Identifying digital opportunities.

THE BUSINESS ISSUE

A leading investment firm wanted to identify which digital account management capabilities have the most customer potential on different devices.

CUSTOM APPROACH

The Radius Financial team designed a survey of investors using an augmented max-diff exercise. This ensured that the digital capabilities were optimized for appeal and usability. In addition, overall attitudes about investing helped the brand team gain a holistic perspective on the customer mindset.

GROWTH OUTCOME

The insights allowed the brand team to customize offerings for different segments and identify those capabilities that could strengthen the relationship with the brand.



BRAND
BUILDING
IN ACTION

Increasing marketing effectiveness.

THE MARKETING ISSUE

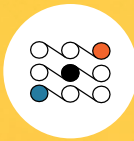
A financial services firm offering a range of banking and insurance products sought to identify and communicate brand differentiation for these products.

CUSTOM APPROACH

The Radius Financial team designed a quarterly brand tracking survey of 1500 customers and 3000 prospects to identify opportunities to strengthen the perception of the company's customer service as well as tracking customer needs.

GROWTH OUTCOME

The survey revealed that the brand's marketing opportunity was to differentiate on emotional drivers in each of its categories. The brand team had clear guidance on the emotional themes to leverage in positioning, marketing, and communications to drive consideration.



Understanding the credit card journey.

THE CUSTOMER ISSUE

The brand team sought to deepen its understanding of how consumers move through the credit card application decision-making process, and to identify key touchpoints to influence consumers along the way.

CUSTOM APPROACH

The Radius Financial team designed a mix of methodologies to holistically explore the credit card journey. In-depth interviews were conducted to hone a quantitative online survey for 1200+ consumers who either opened a new credit card recently or were planning to do so in the next twelve months.

GROWTH OUTCOME

The research insights led to a successful new credit card launch resulting in an 11% lift compared to previous launches. The brand team also gained strategic direction into which touchpoints are most influential along the journey to target future consumers.



Optimizing the communication platform.

THE COMMUNICATIONS ISSUE

A wealth management client had a goal to improve its positioning among financial advisors on a specific type of fund. The brand team wanted to explore potential positioning statements and be able to revise the positioning statements in real-time.

CUSTOM APPROACH

The Radius Financial team developed an agile and iterative research approach to strengthen the positioning statements. The qualitative feedback included real-time concept optimization to revise statements during the groups. An agile quantitative solution validated the performance of fund positioning statements.

GROWTH OUTCOME

Based on the real-time feedback, the initial five statements were consolidated to three, and potential barriers to consideration were discovered. The insights provided the brand team with clear and compelling messaging to enhance brand reputation and develop marketing communications for the new fund.

Meet Radius Financial. A team of financial services experts that understands the fast-moving market landscape and how to deepen customer relationships.



Glenn Staada

Senior Vice President

Glenn is respected by leading financial firms for his unique ability to partner with brand teams. His expertise spans market opportunity, product design, competitive effectiveness, branding and communication, and customer engagement. Glenn is a frequent conference speaker both globally and nationally on topics ranging from customer journey to segmentation.



Christine Drummond

Vice President

Christine is passionate about helping financial brands translate their biggest questions into insights approaches that unlock profitable market opportunities. She helps clients identify the custom blend of qualitative and quantitative solutions for pricing, product, segmentation, brand awareness, and other strategic brand issues.



Lisa London

Vice President

Lisa is a seasoned researcher with experience at both financial organizations and market research firms. Her early career included roles as advisor and research practitioner at Charles Schwab and Bank of America. Lisa has held consulting roles at J.D. Power and MaritzCX, where she honed her skills in customer experience tracking.

Brands that depend on the Radius Financial team to identify business-building strategies:



radius FINANCIAL

Guiding your brand on its growth journey. radiusinsights.com

Learn more about our Brand Growth Navigator — the model our clients rely on to point them in the right direction in segmentation, targeting, customer experience, and more.



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