

# Bring Visual Storytelling to Your Benchmark Performance and Pricing Models

## The Problem with Traditional Wholesaling

Financial services products and platforms traditionally rely heavily on benchmark performance and or pricing to differentiate themselves from their competition. But investment decisions are often emotional decisions and what is needed is an emotional bridge between the data and the decision. We call that bridge *context*. Without context, the performance and pricing narrative is difficult for advisors to interpret and even more difficult for them to communicate to their retail clients. The industry has traditionally hired wholesalers, both internal and external, to help create and communicate that context to advisors.

Wholesaling is about the ability to interpret the performance and provide a narrative that is suitable for use with both advisors and the retail public. This ability to provide insight, interpretation, and explanation is the basis of the wholesaler-advisor relationship. Advisors interpret financial services data for retail clients and provide the context that informs their clients decisions. Wholesaling that enhances an advisor's ability to "tell the story" is the most valuable kind of wholesaling.

But wholesaling today needs help. Meeting face to face with advisors has become more and more difficult, and that was a problem pre-Covid 19.

How are you going to effectively compete in this new reality?

## On Demand Wholesaling is Your Solution

ODW creates digital context that supports wholesalers and asset managers seeking to engage advisors. We are uniquely qualified to tell these stories given our history in the business, our compliance acumen, and our creative capabilities. We don't create product performance sheets, and we try to avoid pricing description as context. We explain and demonstrate the concepts...that lead to investment decisions. In 2 minutes. With graphics, animation, voice, and text.

## See Real-Life Examples in Action

Here are two examples of our work. The first is for an asset manager and their VIT effort. We do not discuss the product in this video, instead we focus on a challenge to an advisor to think more holistically about what diversification really means.

The second is a video we did to assist with the launch of an ETF. Again, the focus is on the concept, in this case Global Health Care, and not about price or performance.

<https://app.fugent.com/t/key/8rO8UqNsLNALW5P7Ufnv8DH>

<https://app.fugent.com/t/key/aArTgH4KkyaYvo8QOI8xDJNy>

Additional examples or our work are available upon request.

## How Our Solutions Are Used to Help You Sell

Our clients deploy our video messaging through multiple channels including email, social media and embedding the video on a website. The primary method for distribution has been through email. We have the capability to distribute the videos through our own email system, or we can provide the video in an appropriate format that will allow the asset manager to distribute using their email system. We have data on these email efforts including the number of emails sent, opens, bounces, unsubscribes, and downloads.

We can document a 5x increase in website traffic for an asset manager after the distribution of one of our videos...

Additionally, through a partnership with [Discovery Data](#) we can assist in the procurement of an appropriate advisor database to power and maximize campaign targeting and reach for our asset manager clients .

## Start Taking Your Prospecting and Pipeline to the Next Level

On Demand Wholesaling was created by a financial services executive with over 35 years of distribution experience. We focus on two core capabilities. Ideation and execution. Many of our clients struggle to create content beyond performance and pricing documentation. Every asset manager has multiple stories to tell. Our experience allows us to create content and context that go well beyond performance reporting. But it's not just a creative exercise. Great ideas are only valuable if you can execute. And we believe that execution is a strategy.

For more on how we can help you to create the stories and deliver the message to advisors, call 614-638-0653, email [rclaythompson19@outlook.com](mailto:rclaythompson19@outlook.com), or visit [www.ondemandwholesaling.com](http://www.ondemandwholesaling.com) to schedule a free consultation.