

# When Rational Isn't Enough: Turning Emotional Insight into Business Growth



**ADVANIS**

A presentation with

Jackson National Life Distributors LLC

Visit us at  
Booth 314



# Is your insight strategy impacting how corporate decisions are being made and your bottom line?

**Insights = Humans + Data**

**Socializing what  
the research  
uncovered**

**Programs rather  
than projects**

**Incorporate  
emotionality**

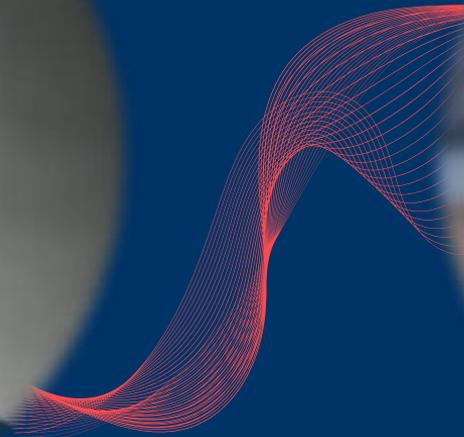


## Glen Franklin

AVP of RIA & Lead Gen Strategy,  
and Research

**Jackson National Life Distributors LLC**

(Glen Franklin is not affiliated with Advanis.)



## Patrick Kyba

Principal Consultant  
Lead for Jackson Projects

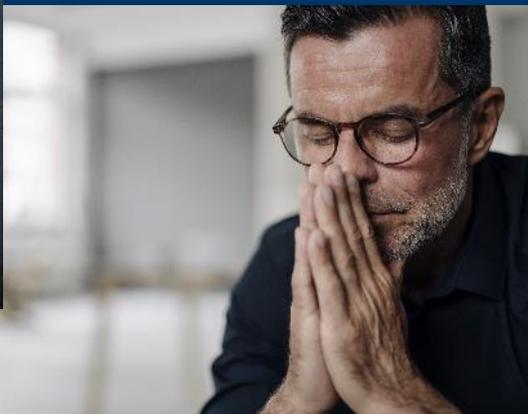
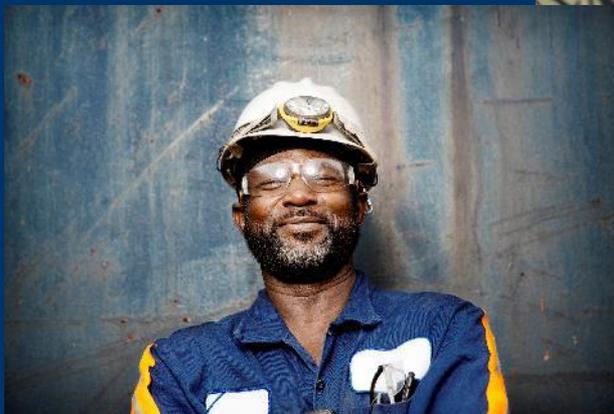


**ADVANIS**

A growing population of Americans are heading into retirement **without a plan...**

**Retirement Income Gap**  
social security limitations  
longer life expectancy  
fewer pensions  
less savings





How can Jackson  
National Life  
Distributors help  
provide some  
**level of security**  
for the growing  
population of  
Americans  
heading into  
retirement  
**without a plan?**

# Our Mission

- ✓ **Elevate Insights:** we are our customers' voice/advocate
- ✓ **Embed Emotion:** because decisions are not just rational
- ✓ **Drive Growth:** our core purpose



# So, what did Jackson & Advanis do?

- ✓ We built a strategic research program
- ✓ Positioned Jackson products among retirement savers and financial professionals



# How To Socialize Insights...

Stories Driven By Analytics



Newsletters & Communications



Interactive Dashboards

8

8

Quant shows the what. **Emotion** reveals the why.



# Financial Decisions – more emotion than logic

We tend to (market) communicate rationally.

But customers don't make decisions in a rational manner.

*“The most concerning thing about my finances are the fact that I have nothing saved and I live paycheck to paycheck. It definitely makes daily life stressful.”*

*I don't usually plan things - for fear I can't do it. So, I just think in the moment; nothing further.”*

*(Survey Participant)*



# Faster alignment and stronger decisions



The insights team  
see patterns



Marketers see  
meaning and hooks



Senior leaders see  
risk and opportunity

# Insights = Humans + Data

Research has impact when it is...

Communicated in  
easily consumed  
pieces

Planned, with  
right combination  
of inputs

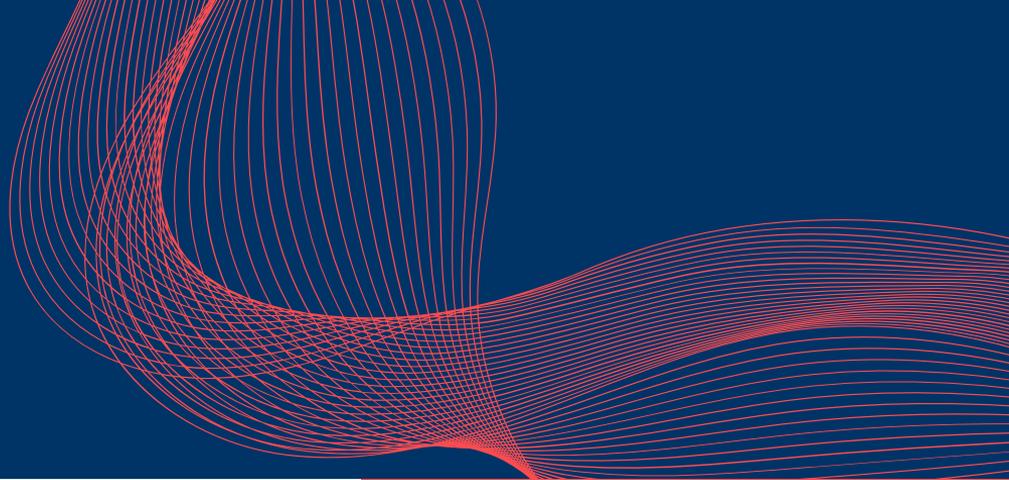
Goes beyond the  
rational... to the  
emotional

*Socialized*

*Programs*

*Emotional*

# What's Next?



## Review existing research assets

- Look for emotional drivers
- Communicate their impact to your stakeholders
- Help them be more effective at achieving their goals.

## Find two ways you can regularly and relevantly communicate to your business. Focus on:

- The insight that you are generating and its commercial relevance
- Creating a comms plan and start to circulate by the end of the month.

Meet us at Booth 314

We will help you embark on this journey to more generate more impact from your insight



Our custom, agile,  
actionable research  
helps decision makers:

Compete Smarter  
Lead with Confidence



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