

JACKSON USES ENGAGING ONLINE VIDEO TO MORE EFFECTIVELY EDUCATE FINANCIAL ADVISORS ON INVESTMENT CHOICES

Success Story

CHALLENGE

Jackson National Life Distributors is a leading distributor of third-party investments through their variable annuity lineup. The company leverages hundreds of wholesalers that network with thousands of financial advisors who then market these investment options to existing and potential clients. These investment professionals need to be educated and updated on the nearly 100 investments within Jackson's lineup so they can clearly communicate the distinct value of each investment option to their clients.

SOLUTION

Jackson is working with its fund partners and Thomson Reuters to develop an investment education platform featuring a library of on-demand video webcasts for each money manager. Archived in a secure online portal, advisors and wholesalers can access these webcasts at their convenience to learn about each manager and its portfolio offered through Jackson. Leveraging video to deliver this content provides greater clarity in the key messages conveyed to Jackson's network so they can more effectively engage clients.

POWERING ADVISOR COMMUNICATIONS WITH ONLINE VIDEO

While many financial services firms are just beginning to integrate multimedia into their communication strategy to improve audience engagement, some have fully embraced this medium and are already looking for ways to build upon years of success.

“We’ve been using multimedia to educate advisors and wholesalers on our products for years,” said Luis Gomez, Vice President of Marketing Strategy at Jackson National Life Distributors, an industry leader in variable, fixed and fixed index annuities, also offering life insurance and institutional products. “If we relied solely on email or mailings to deliver those messages it just wouldn’t be as effective. We’re always looking for innovative ways to differentiate ourselves. Expanding the use of video was the next step in the evolution of our marketing program.”

After discovering Flash-based presentations and video email were more effective than text-based materials in educating advisors and wholesalers about complex products, Gomez sought to develop a library of online videos to provide an even richer experience. “We found that text-based communications led to a lot of confusion as they left room for interpretation and weren’t very dynamic. Video not only helps in simplifying products which are often complex, but it also communicates body language and tone so advisors and wholesalers can really understand how to deliver the message.”

ONLINE VIDEO AS THE CENTERPIECE TO JACKSON’S INVESTMENT PLATFORM LINEUP

The process of building the video library starts with Gomez asking fund partners to create video overviews for select variable annuity options. Once completed, the content is returned to Jackson’s compliance group for review. After feedback is exchanged and the videos are approved, Thomson Reuters uploads the files into a completely customized on-demand video webcast player. Featuring both Jackson’s and the fund’s branding, the player includes links to other fund videos in the series as well as additional resources. Viewers can access the videos in high-resolution 800k Windows Media or Flash streams twenty-four hours a day, seven days a week using any modern Web browser and operating system.

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Vice President of Marketing Strategy
Jackson National Life Distributors

“At Jackson we promote the freedom* to choose from a variety of investment options, and we want to represent that diversity in this video library,” said Gomez. “We’re working toward creating an online investment repository featuring video webcasts from all twenty fund partners along with supporting resources to enhance our communications program and more effectively market our products.”

Gomez added that the unique approach each money manager takes toward crafting its videos makes the resource even more valuable. “The differences really come out in the video, both in the investment options themselves and in the way they are positioned by our partners,” said Gomez. “At the same time, we’re presenting the videos in a consistent way through the webcast solution Thomson Reuters designed for us. It’s a seamless experience from the viewer’s perspective.”

**The freedom mentioned herein is not a reference to Jackson’s LifeGuard Freedom® suite of living benefits.*



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MEASURING THE SUCCESS OF ONLINE VIDEO

Gomez will consider both qualitative and quantitative metrics in gauging the success of the program. “The response we get from advisors and wholesalers is important and their feedback was one of the reasons we have expanded the use of video,” said Gomez. “In addition, we’ll review the analytics Thomson Reuters provides for each of the webcasts—such as visits and viewing time—to help us monitor how well the content is resonating with our audiences.”

When asked about why Jackson chose to work with Thomson Reuters, Gomez responded that it was all about fit. “Of all the providers we evaluated in the marketplace, Thomson Reuters was the best fit for what we wanted to do now and in the future with multimedia. We view Thomson Reuters not as a vendor but as a consultative partner and we look forward to working with them to co-develop innovative online communication programs.”

ABOUT JACKSON NATIONAL LIFE DISTRIBUTORS

Jackson National Life Insurance Company® (“Jackson®”) has a long and successful track record of providing advisers with the products, tools and support they need to design effective retirement solutions for their clients. With \$107 billion in total assets (IFRS)¹, Jackson is one of America’s largest life insurance companies and a leading provider of variable, fixed and fixed index annuities. The company also offers life insurance and institutional products and, through its affiliates and subsidiaries, provides asset management and retail brokerage services. Jackson also ranks third in total variable annuity sales² and had the best-selling VA contract in the independent broker-dealer channel for the past eight years.³

ABOUT THOMSON REUTERS

Thomson Reuters is the world’s leading source of intelligent information for businesses and professionals. More than 5,000 companies, including 90% of the Fortune 500, rely on our measurable multimedia solutions to expand the reach of their business communications and increase audience engagement. Because we offer a broad suite of solutions—from self-authoring and publishing tools to managed webcasts—you can rely on a single global provider to address your multimedia communication needs across marketing, public relations, investor relations and internal communications. Our local service teams around the world understand regional requirements and will work with you to implement best practices.

¹Jackson has \$107 billion in total IFRS assets and \$97 billion in IFRS policy liabilities primarily set aside to pay future policyowner benefits (as of 12/31/10). International Financial Reporting Standards (IFRS) is a principles-based set of international accounting standards indicating how transactions and other events should be reported in financial statements. IFRS is issued by the International Accounting Standards Board in an effort to increase global comparability of financial statements and results. IFRS is used by Jackson’s parent company.

²Variable Annuity New Sales Comparison Report, 2011 Morningstar, Inc.

³Morningstar® Annuity Research Center (MARC), 2003 through 2010 year-end results. Perspective II ranked number 1 out of 577 investment contracts in 2010, 1 out of 528 in 2009, 1 out of 547 in 2008, 1 out of 537 in 2007, 1 out of 495 in 2006, 1 out of 395 in 2005, 1 out of 374 in 2004, and 1 out of 365 in 2003. Perspective L Series ranked 2 out of 577 investment contracts in 2010.

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