e-Delivery Benchmarks 2011

What is Dalbar's e-Delivery Benchmarks Study?

The e-Delivery Benchmarks Study documents industry-wide e-Delivery adoption rates for regulatory documents, including statements, transaction confirmations, prospectuses and annual reports. It examines the financial benefits of e-Delivery, compliance challenges, and the most successful e-Delivery promotional practices. This study further assists firms in finding additional opportunities to leverage e-Delivery.

What Method Was Used?

DALBAR conducts interviews with e-Delivery marketing and fulfillment managers in brokerage, mutual fund, variable annuity and retirement plan firms. Results, in both aggregate and industry-specific terms, are presented on:

- Adoption rates for the most common communications sent to investors
- e-Delivery methods used most frequently
- Formats used
- Compliance issues/challenges
- Promotional campaign expenditures and associated correlation with adoption rates
- ROI measurement practices and results
- Best practices used to achieve high adoption rates

What Will the e-Delivery Benchmarks Report Include?

1. Summary of findings
2. Hurdles to successful e-Delivery implementation
3. Examples of best practices
4. Recommendations based on the principles of behavior-centric communications strategies for overcoming client objections to adoption of e-Delivery

What is the Cost?

Cost for the e-Delivery Benchmarks Study is $2,500. Pre-publication price is $2,000.

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