

# Panacea Adviser



## Partner Newsletter – March 2019

*What's been happening, what's coming up, site stats and everything else Panacea related...*

### Monthly Newsletter

**“It takes a lot of hard work to make something simple, to truly understand the underlying challenges and come up with elegant solutions.”**

**Steve Jobs**



 Wealth & Money Management awards Panacea Adviser Best Financial Adviser Support Expert 2018 - UK	 FINANCE AWARDS 2018 Panacea Adviser Best Financial Advisory Support Services Provider - UK	 winner 2017 women in wealth awards Sarah Paul Panacea Adviser Best for Financial Services Marketing - UK
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## February 2019 Matters

February saw our 13<sup>th</sup> birthday pass by, like me, Panacea is getting a bit older and unlike me hopefully wiser.

It is hard to believe that when we started we were supported by some eight provider firms and an initial community of one hundred advisers.

The community has grown very organically and as at our birthday, the latest database clean shows that the community now stands at 35,554 and the firms that we work with now numbers 48.

We are very proud of this, there is simply no other support service to compare with against our independently verified database of this size, that has such a granular profile knowledge of advisers interests, the [business levels](#) done by firms and the [community](#) look and feel.

To put this in perspective, if Panacea was a network, we would be responsible for some 63% of intermediated market share.

This data allows us to work with you, our clients, in a very focussed way making sure that your message gets to the very specific targets you choose to define and in return give you really valuable warm lead data to follow up.

My thanks goes to all the firms we work with, without them we simply would not have the fuel to do what we do, and to the team behind all this - Sarah, James, Hannah and newbie Chris Park.

### Events and Banner ads

Don't forget if you have any events coming up, whether it is a roadshow, one day event or online webinar, please let James or Hannah know details to add to our events table as this is one of the most viewed areas of the site.

Additionally, if you have banner ads as part of your package allocation please make the most of them. Spec can be found on the partner site by [clicking here](#).

# February 2019 Matters

## **Panacea Careers**

We are excited to be working with Careers Specialist, Luke Welham who will be setting up Panacea Careers over the next few weeks. Luke is LLB qualified professional with seven years recruitment & search experience across the financial services sector. He has worked with a wide range of banks, lenders, wealth & investment managers and insurance firms. His experience covers permanent and interim hires across corporate governance, wealth & financial planning and business change.

Given our community size of 24,000 advisers and Luke's experience, we feel that we have a prime opportunity to assist both Adviser firms and Advisers with their recruitment requirements.

If you would also like assistance with your own recruitment requirements and would like to chat more please let us know.

## **Mailock**

In February we launched Mailock in association with Beyond Encryption. Mailock is a secure, easy, GDPR compliant add-on to your usual email system that allows you to send out sensitive documentation.

The system is easy to use and can reduce costs by sending secure mails rather than posting sensitive documents.

More information about Mailock can be [found here](#), but if you would like any further information about how you can implement this system within your own organisation please don't hesitate to contact us.

# February 2019 Matters

## Solus Mails

Solus mails are one of the most valuable pieces of communication we offer to partners, especially given that we provide the contact data that enables firms to use and establish relationships with the individuals that have clicked on them. Therefore it is important to keep sight of what works well and what doesn't.

In March we performed some analysis around solus mails and layouts. We believe that the site reputation (Panacea's), the day of the week, the subject title and the image all contribute to individuals opening an email and the content and layout will get people clicking. It is important to try and get all these elements right to optimise the number of individuals that both open and click.

Since launching the new look solus mails in September, we have sent 38 emails.

### ***Best examples of opens/open rate***

[FundsNetwork - Calculating Capital Gains](#) (Best opens and open rate)

[Prudential - A new investment universe to explore](#) (2nd best open)

[Rathbones research report - The value of DFM](#) (3<sup>rd</sup> best open)

[Your Future SIPP, by Curtis Banks](#) (2nd best open rate)

[FundsNetwork - Pension considerations at tax year end](#) (3<sup>rd</sup> best open rate)

Titles here tend to be very directive, to the point and explain what the subject is about and what you need to do or know as the reader. There is nothing ambiguous and product names aren't used.

Additionally the images used tend to be bold and eye-catching.

### ***Day of the week***

The days of the week that featured in the top ten most opened solus mails the most were Tuesdays and Wednesdays which would suggest these are the days when advisers are most receptive to this type of communication.

# February 2019 Matters

## *Best examples of clicks/click through rate*

[Invesco Investment Intelligence Seminars](#) (Best clicks and CTR)

[FundsNetwork - Calculating Capital Gains](#) (2<sup>nd</sup> best clicks)

[Your Future SIPP, by Curtis Banks](#) (2<sup>nd</sup> best CTR)

[Rathbones research report - The value of DFM](#) (3<sup>rd</sup> best clicks and CTR)

## *Page layout*

In terms of layout we offer the ability to use either one-column, two-column or four-box layouts on solus mails. The single column solus was used slightly more than the others but were definitely the more successful when looking at those featured more in the top 10 against those that featured in the lesser performing 'bottom five'.

## *Page content*

If you take a look at word count of the solus mails with the most clicks, the average number of words was 138.6. So we recommend a word count of around 140 words as prime.

We also looked at the number of clickable links within each solus and these best performing solus mails had one link early on in the copy then one larger one, or button towards the bottom of the page as a clear call- to action.

Those that didn't perform so well seem to have the following in common:

- Centred paragraphs
- Contained compliance wording within the actual body of the email
- Either lots of words (over 200) or not enough words (less than 100)
- More than 2 links

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# February 2019 Matters

Additionally if you take a look at the subject matter you can see that the subjects that tend to work well are:

- events announcements
- new video announcements
- guides/white papers launches
- product launches

Additionally, if a subject matter is quite specific then it would be better to send out to quite a targeted group of individuals as apposed to the entire community.

## **Summary**

This analysis would therefore seem to show that to create a high performing solus you need the following elements.

- Title to be very directive, to the point and explain the subject matter. Don't use product name.
- Bold/strong imagery
- Send date on Tuesday or Wednesday
- One column, left hand aligned
- 2 clickable links, one of which is quite a bold CTA near the bottom of the screen
- Between 100-140 words
- Consider who the message should go to
- Finally have something to say!

I hope that you find this analysis useful and if you ever want any feedback in relation to forthcoming solus mails please let us know and we would be happy to provide input.

# February 2019 Matters

## **Solus of the Month**

Congratulations to Prudential who won our 'most opened solus of the month' Award with their mailing [A new investment universe to explore](#)

## **Welcomes & Renewals**

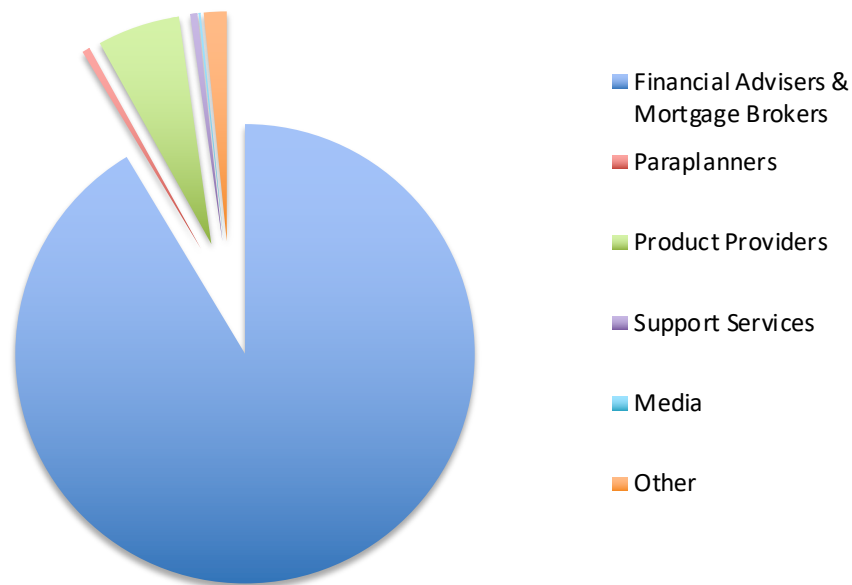
This month we would like to welcome Blackfinch to Panacea's growing roster of partners. It is great to see some fresh content and new ideas. Additionally we would like to thank Rathbones and Royal London for confirming their renewals. We are always delighted when firms want to work with us for an additional year and appreciate that they see the value in what we are able to provide.

## **Derek Bradley**

Ceo, Panacea Adviser

## Bento bulletin recipients

The Bento bulletin recipients are broken down as follows as at end of February 2019.

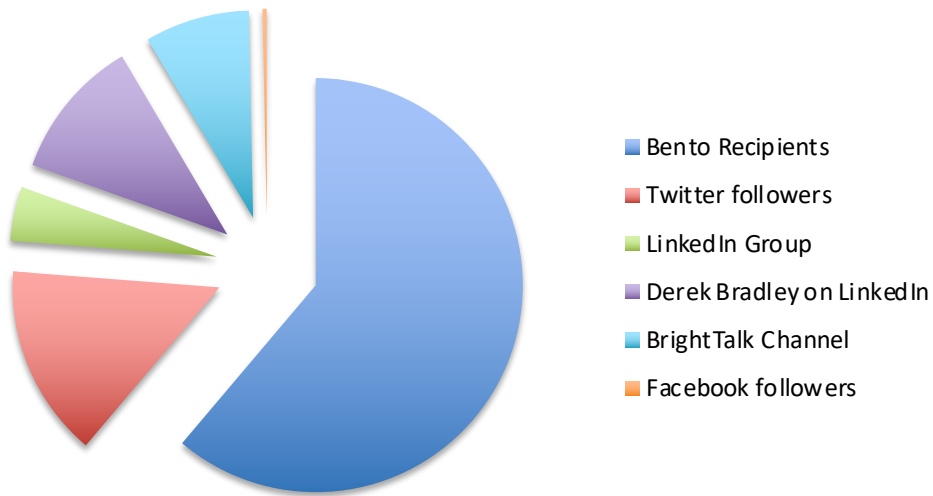


Type	Amount
Financial Advisers	24,379
Paraplanners	70
Product Providers	720
Support Services	90
Media	21
Other	246
<b>TOTAL</b>	<b>25,526</b>



# Panacea community

The total community is broken down as follows as at end February 2019.



Communication	Amount
Bento recipients	25,526
Twitter	3,793
LinkedIn Group	1,043
Derek Bradley LinkedIn	3,050
BrightTalk Channel	2,062
Facebook	80
<b>Total</b>	<b>35,554</b>

Uniquely, we also communicate and post our Bento Bulletin to members of 42 LinkedIn groups with an outreach of c.500,000

# Site Stats – February 2019



Top Ten Most Viewed Pages
<a href="#">home</a>
<a href="#">news &amp; views</a>
<a href="#">Events</a>
<a href="#">Busting the millennial myth</a>
<a href="#">What it really takes to conduct exceptional client conversations</a>
<a href="#">Tools &amp; Resources</a>
<a href="#">About us</a>
<a href="#">Feel brave enough FCA?</a>
<a href="#">Selling your services - one thing most experts don't know</a>
<a href="#">The power of an incisive question</a>

## Bento bulletin stats

The most opened Bento was 26<sup>th</sup> February with 4,303 opens (16.72 OR)

The most clicked Bento was 27<sup>th</sup> February with 228 clicks (5.5 CTR)

Issue No	Issue Date	Deliveries	Opens	Open Rate %	Click-throughs	CTR %
1004	Feb 1, 2019	21,386	3677	17.19	137	3.7
1005	Feb 4, 2019	21,334	3895	18.26	295	7.6
1006	Feb 6, 2019	21,283	2850	13.39	105	3.7
1007	Feb 8, 2019	21,219	3580	16.87	221	6.2
1008	Feb 12, 2019	21,162	3573	16.88	113	3.2
1009	Feb 14, 2019	21,133	3642	17.23	103	2.8
1010	Feb 18, 2019	21,013	3772	17.95	187	5.0
1011	Feb 21, 2019	20,970	3692	17.61	173	4.7
1012	Feb 26, 2019	25,743	4303	16.72	194	4.5
1013	Feb 27, 2019	25,681	4,145	16.14	228	5.5
<b>TOTAL</b>		<b>220,924</b>	<b>37,129</b>	<b>17%</b>	<b>1,756</b>	<b>5%</b>

Note: Open rates are minimum rates as if they are viewed in the preview panel of an email system, this is not counted as an official 'open'. We also don't count any reads via Twitter or LinkedIn within this.

## Top ten news stories

Issue	News story
<a href="#"><u>1005</u></a>	<a href="#"><u>Busting the millennial myth</u></a>
<a href="#"><u>1012</u></a>	<a href="#"><u>What it really takes to conduct exceptional client conversations</u></a>
<a href="#"><u>1010</u></a>	<a href="#"><u>Selling your services - one thing most experts don't know</u></a>
<a href="#"><u>1007</u></a>	<a href="#"><u>The power of an incisive question</u></a>
<a href="#"><u>1011</u></a>	<a href="#"><u>Brexit: Deal or No Deal? Or Something in Between?</u></a>
<a href="#"><u>1013</u></a>	<a href="#"><u>Scottish Mortgage – Invest in Progress</u></a>
<a href="#"><u>1013</u></a>	<a href="#"><u>Old Mutual Wealth: Five tax tips that demonstrate the value of advice</u></a>
<a href="#"><u>104</u></a>	<a href="#"><u>Plastic (not so) fantastic</u></a>
<a href="#"><u>1005</u></a>	<a href="#"><u>M&amp;G: 4 recommendations to up your ESG game</u></a>
<a href="#"><u>1007</u></a>	<a href="#"><u>Aegon: An update on the lifetime allowance</u></a>

## Top ten partner stories

Issue	Partner	Article	% Of Clicks
<a href="#">1005</a>	Schroders	<a href="#">Busting the millennial myth</a>	12%
<a href="#">1011</a>	Legg Mason	<a href="#">Brexit: Deal or No Deal? Or Something in Between?</a>	7%
<a href="#">1013</a>	Baillie Gifford	<a href="#">Scottish Mortgage – Invest in Progress</a>	6%
<a href="#">1013</a>	Old Mutual	<a href="#">Old Mutual Wealth: Five tax tips that demonstrate the value of advice</a>	5%
<a href="#">104</a>	Aviva Investors	<a href="#">Plastic (not so) fantastic</a>	5%
<a href="#">1005</a>	M&G	<a href="#">M&amp;G: 4 recommendations to up your ESG game</a>	4%
<a href="#">1007</a>	Aegon	<a href="#">Aegon: An update on the lifetime allowance</a>	3%
<a href="#">1006</a>	Royal London	<a href="#">Diversification delivers</a>	3%
<a href="#">1006</a>	Defaqto	<a href="#">Defaqto: Risk tools – are they all that?</a>	3%
<a href="#">1005</a>	Aegon	<a href="#">Aegon: Register for our Demystifying trust and IHT planning webinar – earn 40 minutes of CPD time</a>	2%

# What's coming soon...

## What's coming soon

Learning & Development are of the site

We are working on re developing the learning & Development and Business Development areas of the site to make them more 'sticky' and a go to place for Advisers learning and business needs. We will keep you up to date with the developments as they happen.

## Contact us!



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