



Your time is  
worth more than  
Chasing Ghosts.

*When advisors ask you to  
add new products, we call  
that “Chasing Ghosts”*

# Client Case Study

## Product Teams Waste Time Chasing Ghosts

We have a broker-dealer client who receives calls from Advisors every week asking to add a new product to the product shelf. (New Advisors are the most guilty.)

As much as the product team would like to ignore such requests, they wisely realize that Advisors generate the revenue that pays for everyone's salary. While the product team wants Advisors to know their suggestions are taken seriously, they also don't want a product shelf full of stray dogs. So one unlucky member of the product team must go chasing ghosts. It's not the most productive use of their time. Regardless, they spend valuable time putting together a case the goal of which is to say "No" to the Advisor without creating a detractor.

### FACTOR IN THE DDW TEAM

While it was never a goal of our DDW Team to chase ghosts for our clients, we have found that it is a meaningful way our team can support your team. DDW can help keep your team focused on more important matters than chasing ghosts because we have a vault full of research which we can use to appease even the most ardent Advisors.



## Supporting Your Team

### HOW OUR DDW TEAM CAN SUPPORT YOUR TEAM:

- We can bring an "expert, independent analysis" which can carry more weight.
- We can identify the weaknesses in the product that make it an inferior product.
- We can share our "Product Snapshot" which shows our rating and analysis of the product.
- We can provide a product comparison which identifies a product that is currently on your shelf that is the best, and sometimes better, alternative.
- (Important Note: Sometimes we have the unpleasant task of explaining to the product team that the Advisor's product idea is actually an improvement to the product shelf. Which is actually a good thing in the long run. Best Interest Advice is grounded in a Best Interest Product Shelf and upgrading a product shelf is the never-ending challenge of a product team.)



**GIVE US A CALL TODAY**  
to learn how the DDW team can help you maximize time instead of chasing ghosts.

## ABOUT DUE DILIGENCE WORKS

- We enable Wealth Management Firms to deliver “Best Interest Advice”:
  - Ongoing Due Diligence of investments and insurance products,
  - Product Shelf Management helping firms review the entire universe of products (not just the platform); ensuring the best products are on the shelf with supporting documentation.
- All in a variable cost model that can reduce cost, improve quality, and stand the test of regulatory scrutiny. Some clients also see enhanced revenue.

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