

# Q&A: J.P. Morgan Wealth Management exec says investors seek a 'guiding light in the current economic climate'

Article

**Wealth management CMOs** are under constant pressure to keep up with the rapid pace of change within the space. Economic volatility means marketers are adjusting their messaging in near real-time to reassure clients they are a safe pair of hands. And the greater variety of investors entering the market, coupled with the growing popularity of new social media platforms, means wealth managers need to further refine their segmentation of clients according to their widely differing demands.

To dig into how wealth management heads of marketing are approaching these challenges and to better understand how MarTech and analytics will unlock personalized strategies, we spoke with **Danielle Robles**, head of acquisition and aspiring affluent marketing at **J.P. Morgan Wealth Management**.

**Danielle Robles**

**Head of Acquisition and Aspiring Affluent Marketing, J.P. Morgan Wealth Management**



*The following has been edited for brevity and clarity.*

## Insider Intelligence (II): What responsibilities fall under your role?

**Danielle Robles (DR):** The role has a broad remit. We oversee new client acquisition, brand engagement marketing, and field marketing across all our investment distribution channels

## II: How has the role changed over the last few years?

**DR:** There's much more of a business strategy component. As the champions of the customer, **we have a growing influence over product strategy.** Previously, products might be designed without the voice of the customer—but now marketing has a much greater role in providing this input. An increasing focus on data analytics and MarTech has evolved the role as well.

## II: And how does marketing differ in wealth management to other industries?

**DR:** Wealth management is a market-driven business, so the conversations that you have with your customer happen much more quickly than other financial services sectors. You still need to have timely and relevant conversations in banking and payments, but **in wealth management, the pace of change is much faster as people worry about the money that they have invested in the market.**

## II: What are the top trends in wealth management marketing currently?

**DR:** Responding to economic volatility is a major trend. **There's a need to continue to be the guiding light in the current economic climate.** We also have to do everything a little bit faster to be really relevant with the content and research that customers need.

**Another trend is the democratization of investing.** So many more people are participating in the market that we need to think about customers' needs in a much more varied way. The wider range of investors calls for much greater personalization. This is a challenge, as marketers are still putting together the data infrastructure and the MarTech to enable us to deliver the personalization that clients demand.

## II: What are some of the other challenges you're coming up against?

**DR:** The rise in values-based investing. **We need to be able to talk about ESG and sustainable investing** in a way that customers understand and that is also safe from a legal risk compliance standpoint.

**Also the proliferating number of social media platforms.** TikTok's engagement spiked through 2021. We need to engage younger customers in the channel of their choice. And these social media platforms each have different rules of engagement. It's a challenge for us to

figure out how to flex our brand so that we can deliver on each platform in a way that's authentic to us and interesting to the customer.

**II: If you were to look ahead five years, what would successful marketing look like?**

**DR:** Data and analytics will be at its center. Marketers need to possess a single view of the customer. Leading wealth firms will put in place the data infrastructure and MarTech to create that single view. **This will encompass a much more expansive set of predictive models and greater automation of marketing processes, experimentation, and testing in every single campaign.** This will help us deliver the personalization needed by taking insights and placing them in many different parts of the customer journey across the digital and marketing channels. Analytics will therefore become much more of a foundational skill set for marketers

**II: Do you foresee it being a challenge attracting personnel who have an analytics background?**

**DR:** There's a wide-scale recognition that the foundational analytics skill set needs to be there. The bigger challenge is combining the art with the science. But it's equally important to make sure that we get the right blend; **I don't think it's ever going to be purely about the science. It just needs to be more scientific than it is today.**