



ESG REPORT SERIES

# Help Advisors Sell More ESG

**For over 20 years, SS&C's team has published the industry's premier research and thought leadership about distribution trends in asset management, and its consulting team has worked with leading asset managers to optimize their sales and marketing strategy.**

Explore our research on the popular topic of environmental, social and governance investing (ESG) on the following pages. Additionally, our research team covers a variety of distribution-related topics, so please reach out to us at [mcressy@sscinc.com](mailto:mcressy@sscinc.com) if you are interested in learning more.

For more information, visit  
[ssctech.com](http://ssctech.com)





## ESG Series Overview

For the past few years, headlines have touted the surge of interest in environmental, social and governance investing (ESG) investing. Asset managers are clearly enthusiastic as well – 81% of firms now have ESG strategies in their product line-up and 90% of firms ranked ESG strategies among their top 5 product launch priorities over the next year.

But there's one critically important audience who isn't so enthusiastic about ESG – financial advisors. Our recent advisor survey showed that just two in five advisors have ever used an ESG strategy in client portfolios – the majority, 3 in 5, have not. Even the advisors who have used ESG strategies have concerns that make them reluctant to sell more of these products.

Bottom line, getting advisors to embrace ESG products is still a tough sell. The *How to Win Over ESG-Reluctant Advisors* report takes a closer look at advisors who have not yet incorporated ESG strategies into client portfolios, and what asset managers can do to win them over and grow the ranks of advisors using ESG products.

The remaining items in this series focus on the advisors who have used ESG strategies. They reveal surprising facts about the traits of advisors most likely to use these products, as well as how advisors are actually using them in client portfolios.

Several reports explore why these advisors use ESG strategies so infrequently. Because despite all the headlines and studies showing that investors are highly interested in these products, just three in 10 ESG using advisors ask every client if they're interested in ESG investing. Since advisors can't sell products they haven't discussed with clients, the reports explore why even advisors who use have used ESG strategies are reluctant to do so more often – and what firms should do to address this reluctance.





## ESG Research Topics

Our research series provides a wealth of insights into the concerns and obstacles preventing advisors in both groups – the ESG users and non-users – from seeing if clients are interested in ESG investing.

The research reports in the series also provide our top strategies and recommendations for addressing these obstacles more effectively – and getting advisors to sell more of their ESG products.

### **Building Confidence in Client Conversations About ESG**

**53-page report**

The number one reason advisors don't use ESG strategies with more clients – they're too uncomfortable talking about ESG investing and the related issues with clients to even ask if they're interested. This report offers firms four important strategies to conquer these concerns and help advisors navigate these discussions with more confidence.

### **How Advisors Use ESG Products**

**25-page chart deck**

Deck of charts with key findings about advisors' use of ESG strategies, including the products they use and allocation practices. It also reveals how stratified usage is among advisors, with High ESG Users appearing to be significantly more committed to ESG strategies overall than the Normal ESG Users – creating notable differences in their behavior and product use.

### **Getting Advisors to Choose Your ESG Product**

**59-page report**

Half of advisors who have used ESG strategies say a lack of confidence in their ability to choose the right ESG products for their clients keeps them from introducing the idea of ESG investing to their clients. This report offers three key strategies to help firms address this important concern and differentiate their products in an increasingly competitive ESG marketplace.

### **Meet the Advisors Using ESG Products**

Infographic with insights on the demographic and business traits of the two in five advisors who use ESG strategies with clients.

### **How to Win Over ESG-Reluctant Advisors**

**48-page report**

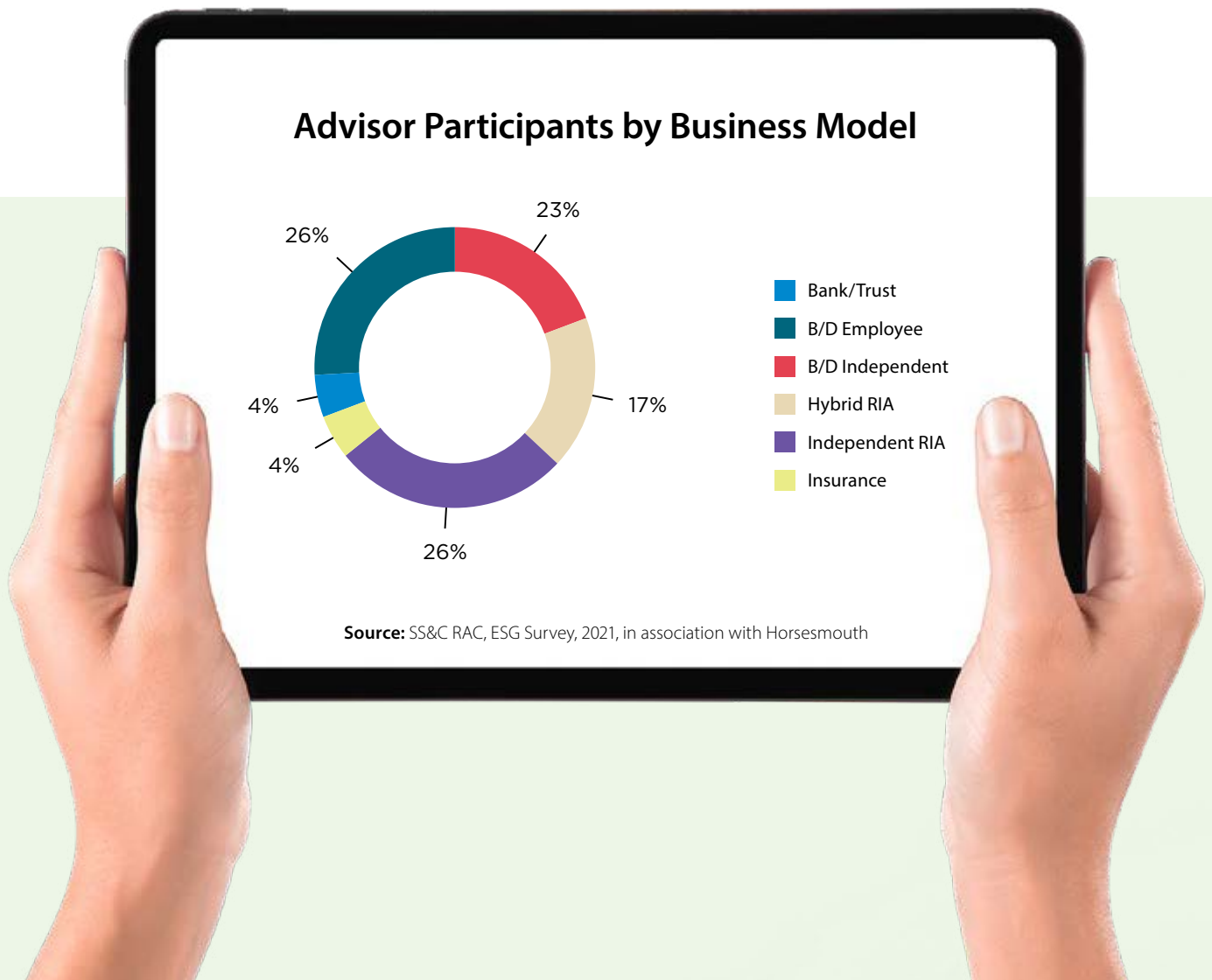
This report explores the underlying causes of advisors' apathy to ESG and provides four strategies to overcome their confusion and skepticism about ESG in general. While the data focuses on the three in five advisors who don't use ESG products, the strategies are highly relevant to advisors who do as well.



## Methodology

The SS&C Research, Analytics, and Consulting research team, in association with Horseshmouth, conducted the ESG survey in Q1 2021.

Respondents included 469 advisors operating in seven different channels and six different advisor business models.





## Get the ESG Report Series

### Two ways to purchase:

1. [Click here](#) to purchase the series online
2. Email Jessica Morris at [jmorris@sscinc.com](mailto:jmorris@sscinc.com) to request an invoice





## Learn More

SS&C Research, Analytics and Consulting helps asset managers prepare for the future of distribution.

Consulting projects include helping asset managers to:

- **Sales Coverage:** Leverage data and create an optimal approach to sales coverage that includes in-person, remote, and digital sales teams
- **M&A Support:** Integrate two post-acquisition sales teams into a consolidated organization
- **Territory Optimization:** create a new approach to advisor segmentation and using it to re-define sales territories

To learn more, visit [ssctech.com/distribution](https://ssctech.com/distribution)



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