

Bill Doyle

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Digital Trends in Wealth Management

Biography

During my 15 years at Forrester I've led the company's coverage of the financial services industry. I have led our research on other industries as well, including media and online advertising. I've authored several Forrester Big Idea documents, including "Customer Advocacy: The Secret To Loyal Financial Services Customers." Before joining Forrester, I spent 15 years designing, building, and running online services for business and consumer users. As a producer-in-chief for the AT&T Business Network, I led the design and implementation of one of AT&T's first Web-based products. I also led the development and launch of Ziff-Davis Interactive's services for Prodigy. Before Ziff-Davis, I was a vice president and creative director of new product development at Citibank, where I led the development of the user interface and applications for the first full-screen consumer telephone. I also managed relationship marketing for Citibank's PC banking service. Prior to Citibank, I helped build and then ran Huttonline, the first-ever online service from a full-service brokerage. I was also a researcher and writer at Newsweek. As happens with analysts, I've been quoted widely in publications including the Wall Street Journal, The New York Times, USA Today, and BusinessWeek. I particularly enjoy serving as a speaker and moderator at conferences. As host of Forrester's Financial Services Forum for 10 years, I've conducted on-stage interviews with the chairmen and CEOs of dozens of major firms, including American Express, Bank of America, Capital One, Charles Schwab, Citi, Edward Jones, and Vanguard. Specialties I specialize in the attitudes and behaviors of mass-affluent and affluent investors; online investing; brokerages, mutual funds, and insurers; financial advisors; financial firms' Web sites; and customer loyalty. I've helped brokerages, asset managers, and insurers design their Web sites, segment their clients and prospects, and understand their market opportunities.

Availability

Keynote, Moderator, Panelist, Host/MC

Industry Expertise

Financial Services

Areas of Expertise

Mobile, Social, Usability, Advice, Investing

Sample Talks

The Top Five Digital Trends For Wealth Management

Rocketing adoption ? by financial advisors and agents as well as investors ? is driving five digital trends that will change the wealth management industry. Smart eBusiness managers will follow the example of early leaders, including ETRADE and Generali on the mobile Internet, PIMCO and Ameriprise in social media, Vanguard and Jackson National in online video, Nationwide and Schwab in online advice, and Fidelity in usability.

Event Appearances

The Splinternet and Its Impact on Financial Services
Global Investors

Social Media For Advisors, Agents, and Investors
Securities Management Forum

Winning the Loyalty of Today?s Financial Services Consumers
Wealth Management Summit

Mobile for Investors, Agents, and Advisors
The Consumer Forum

Education

Harvard University
B.A.

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