



Contact: Jamie Josephs
617.624.7159
jajosephs@dalbar.com

DALBAR: e-Delivery Notifications – AKA “Electronic Envelopes” – They Matter

(Marlborough, MA. September 28, 2021) DALBAR’s recent research illustrates that the structure, design, content and quality of messaging within e-Delivery notifications are crucial. These notifications signify the arrival of a new document in the same way a paper envelope announces new correspondence. These ‘electronic envelopes’ must therefore draw interest, action and most importantly, trust.

Upon their arrival, e-Delivery notifications should proactively provide a measured level of detail, either in the subject line or the body of the email, to help recipients determine if immediate action is necessary. **Ameriprise, Charles Schwab, Fidelity and Morgan Stanley stand out in their deliberate efforts to provide pertinent details about the available document, be they in the header or within the first few lines of the email.**

Email recipients may be hesitant to follow hyperlinks in emails, thus underscoring the need for professional, well-branded communication. The vast majority (79%) of financial firms do place hyperlinks within document emails, averaging between 5 to 8 links depending on the notification type. **Edward Jones, Merrill and T. Rowe Price are among the firms that shine in their use and placement of hyperlinks to enable seamless access to available documents, as well as additional materials.**

In addition to scrutinizing the content, ease of access to documents, design elements and additional support offered within electronic document notifications, DALBAR also looked at how firms leveraged notifications to promote the adoption of other digital resources. **Baird, Edward Jones, John Hancock and Merrill are among those firms that effectively utilize document notifications to promote resources that will potentially drive visits to the site.** These promotional tactics help to further engage recipients with the website and prolong their stay beyond the time it would take to simply retrieve a document.

[DALBAR’s State of the Industry: e-Delivery Notifications](#) research examines notifications pertaining to 4 different types of documents. The report drills down on best-in-class practices in identifying the purpose of the email, the ability to drive client action, the provision of seamless access to the document and utilization of effective design practices. For more information about this report, please visit the [DALBAR Intellect store](#) or email DALBARIntellect@dalbar.com.

[DALBAR, Inc.](#) is the financial community’s leading independent expert for evaluating, auditing and rating business practices, customer performance, product quality and service. DALBAR awards are recognized as marks of a superior standard of care in the financial community.