

Staff

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Timeline

10:00 AM - 11:00 AM

Date

March 27, 2020

Webinar: When and How Rigorous Research Can Be Successfully Incorporated into Financial Product Delivery

Conducting rigorous research on financial products can deliver key, actionable insights to financial institutions, but knowing how and when to work with academic researchers to develop a long-term research project can be complicated.

In this webinar, researcher [Jeremy Burke](#) (University of Southern California), [Jean Elias & Christel McDuffie](#) (Consumer Education Services Inc.), and [Kate Glynn-Broderick](#) (Innovations for Poverty Action) shared their experience partnering on a randomized evaluation of adding encouragement messaging and debt reframing to a Debt Management Plan. The webinar provided participants with an inside look at the challenges and benefits of this research partnership and shared some of the early results that have come out of the project. Participants learned how the efforts of rigorous research can pay off in improvements in product design and customer success.

About the Presenters:

Jeremy Burke, *Senior Economist | University of Southern California, Center for Economic and Social Research*

Jeremy Burke is an economist and Research Scientist at the University of Southern California's Center for Economic and Social Research. Dr. Burke has led multiple field experiments leveraging behavioral principles to help consumers build savings (with soft-commitment mechanisms), reduce debt (with lottery linked incentives), and build credit (with behavioral nudges).

Jean Elias, *Vice President of Marketing | Consumer Education Services Inc.*

Jean Elias joined CESI in 2015 as Vice President of Marketing bringing with her over a decade of experience in the financial services industry, including the debt relief and structured

settlement verticals. Passionate about customer experience and financial education, Jean has spent over a decade connecting highly leveraged consumers to products and services aimed at improving their financial outlooks and achieving their goals.

Christel McDuffie, *Director of Creditor Services and Compliance | Consumer Education Services Inc.*

Christel McDuffie is responsible for ensuring CESI adheres to all state and federal regulations concerning debt management as well as creditor guidelines. Her other responsibilities include managing all functions of the Creditor Services and Resolutions departments. Christel began her career at CESI Solutions in 2002 as a credit counselor. Since then, she has also served as Assistant Education Director, State Licensing Coordinator and is currently the Director of Creditor Services and Compliance.

Kate Glynn-Broderick, *Associate Director | Innovations for Poverty Action, Financial Inclusion Program*

Kate Glynn-Broderick oversees a portfolio of randomized evaluations around women's economic empowerment to find effective solutions to help the poor manage and grow their money successfully. Prior to joining IPA, Kate was a Research Manager at Women's World Banking, where she conducted qualitative and quantitative research on financial inclusion, with a focus on women's empowerment and livelihood outcomes. She previously served as the Deputy Director of Field Research, Data & Analytics at the New York City Department of Consumer Affairs' Office of Financial Empowerment.

City

Webinar

Country

United States