

— A ONE-SHEET FOR FINANCIAL SERVICES AGENCIES

Conveo for financial services.

AI-moderated qual that passes the compliance review.

Financial services research has to clear two bars: the insight has to be deep enough for a strategy team, and the platform has to clear procurement, infosec and compliance. Conveo is built for both. **SOC 2, ISO 27001, GDPR, global/custom data residency, RBAC and study fencing.**

Why agencies choose Conveo

- 01 Procurement-ready** — SOC 2 Type II, ISO 27001 certified, GDPR, global/custom data residency. Trust Center on request.
- 02 Custom & client panels** — Self-recruited panels for your client's own customers, or 8+ integrated partners.
- 03 Compliance flags built in** — Profanity, fraud, attention, sensitive-topic, plus any client policy flag. PII off by default.
- 04 Multi-country at scale** — 48 languages, localised stimuli, parallel reads. Switching studies across 6 markets, one project.

Financial services research

JTBD and switching study

Trust & brand equity

Pricing & willingness-to-pay (qual)

Compliant messaging test

Onboarding UX & app flow

Wealth & advice research

Insurance claims journey

Multi-country payments JTBD

Case example: a multi-country travel-payments JTBD across 4 markets, fielded in one programme. *Ask your Conveo contact if you want to have a look.*

The financial-services capabilities that matter



01

Procurement-ready

SOC 2 Type II, ISO 27001 certified.
GDPR, HIPAA. ISO 42000 Lol signed.



02

Custom / local residency

Choose where your client's data sits.
In-region hosting to match procurement and jurisdiction.



03

Compliance flags

Profanity, fraud, attention, PII, plus any client-specific policy or sensitive-topic flag.



04

RBAC + study fencing

Role-based access and study-level fences for sensitive engagements.



05

48 languages, localised

One programme across markets.
Multi-country payments and switching studies, one project.



06

Self-recruited panels

Upload the client's own customers, or your panel. On top of 8 integrated providers.

Compliance & security

SOC 2 Type II	● Certified	ISO 27001	● Certified
HIPAA	● Compliant	ISO 42000	● Lol signed
GDPR	● Fully compliant	Data residency	Global / custom
Training on your data	● Never	Access control	RBAC + study fencing

TALK TO US

Research your compliance team signs off on.

Pilot Conveo against a regulated study, day one.

Get in touch →

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