

Consider the Viewer

D O N ' T M A K E Y O U R M A T E R I A L P A I N F U L



Let's begin with the obvious: your clients are not flipping through investor decks in mahogany-paneled boardrooms. They're not dutifully logging into legacy portals, reading 30-page PDFs with a glass of wine and a yellow highlighter.

They're on their phones. They're on LinkedIn. They're in back-to-back meetings and opening your update between a Slack ping and a WhatsApp message. In short: your content is competing with everything else on their screen. And it's losing.

But it's not your fault—not entirely. You were told that "client engagement" meant putting a bunch of documents behind a login. That if you made things secure enough, organized enough, it would qualify as "value." That a portal, no matter how clunky, was a gesture toward professionalism.

It isn't. Not anymore.

The Great Misunderstanding

We forget, too easily, that your clients are viewers now. They swipe. They skim. They forward. They expect what they engage with to perform—visually, functionally, intuitively.

That means your PDF deck isn't just being read (if it's read at all). It's being judged—on design, on clarity, on whether it loads without friction. And your portal? It's being judged against Netflix, Instagram, and YouTube. Not fair, maybe. But absolutely true.

What we call "investor communications" has become a kind of unintentional satire: designed for compliance, not comprehension; built to protect information, not deliver it.

But They Logged In!

Did they? Really? Or did they try, fail to reset a password, and give up somewhere around "Your token has expired"?

The problem with most portals is not just that they're ugly. It's that they assume the viewer has infinite time and a deep desire to excavate information. They don't. They never did. But now, they have other options—other feeds, other platforms, other firms. The passive consumer is dead. The client is active, visual, impatient.

Modern Delivery is Modern Respect

The next generation of client platforms won't look like portals. They'll look like media: modular, fast-loading, mobile-first. Think dashboards, not folders. Think video updates, not email attachments. Think trackable insights, not polite check-ins.

And the firms that understand this shift—the ones that respect the viewer as much as the message—will build actual engagement, not just access.

So: Consider the Viewer

Not just what they want to see, but how they want to see it. Not just what you say, but what it feels like to receive it.

Because in a world where time is attention and attention is power, the most valuable thing you can give your clients isn't another PDF. It's an experience worth staying for.