Dimensional

2026 Communications Masterclass

Structuring an Effective Communication Strategy

Courtney Scott
Regional Director, Manager, and Vice President

July 30, 2026

Dimensional

Recent studies on daily information consumption estimate that the average person processes up to **74GB** of information daily across all mediums.

This is roughly equivalent to taking in **100,000 words** or **16 movies** per day.

https://joanne-griffin.medium.com/the-capacity-challenge-daa594097b02

Shortening Attention Spans

Dimensional

Average Attention Span of a Goldfish

8.0

seconds

Average Attention Span of a Human

9.0

seconds

Source: Statistic Brain.

Dimensional

Halo Effect
Illusion of Control
Recency Bias
Survivorship Bias
Confirmation Bias
Cognitive Dissonance
Loss Aversion
Availability
Irrational Escalation
Sunk Cost Fallacy
Fallacy
Conjunction
Illusion of Validity
Mental Accounting
Regret Avoidance
Greed
Endowment Effect
Attribution Bias
Baader-Meinhof Illusion
Intuition
Bias Blind Spot
Overconfidence
Muller-Lyer Illusion
Crystalized Thinking
Dunning-Kruger Effect
Representativeness
Framing
Survival Instinct
Illusory Correlation
Negativity Bias
Hindsight Bias
Outcome Bias
Semmelweis Reflex
Gut Instinct
Anchoring & Adjustment
Gambler's Fallacy
Pattern Seeking
End-of-History Illusion
Turkey Illusion
Base Rate Neglect
Resulting
G.I. Joe Fallacy
Peak-End Illusion
Fear

Why are you here?

Over the next 12 months, how many times do you want to meet with your advisor?

3.3x

What is your preferred number of:

Virtual meetings

In-person meetings

Results from the Dimensional January 01, 2021 – April 30, 2026 Global Investor Study (43,750 clients.)

What is your preferred number of:

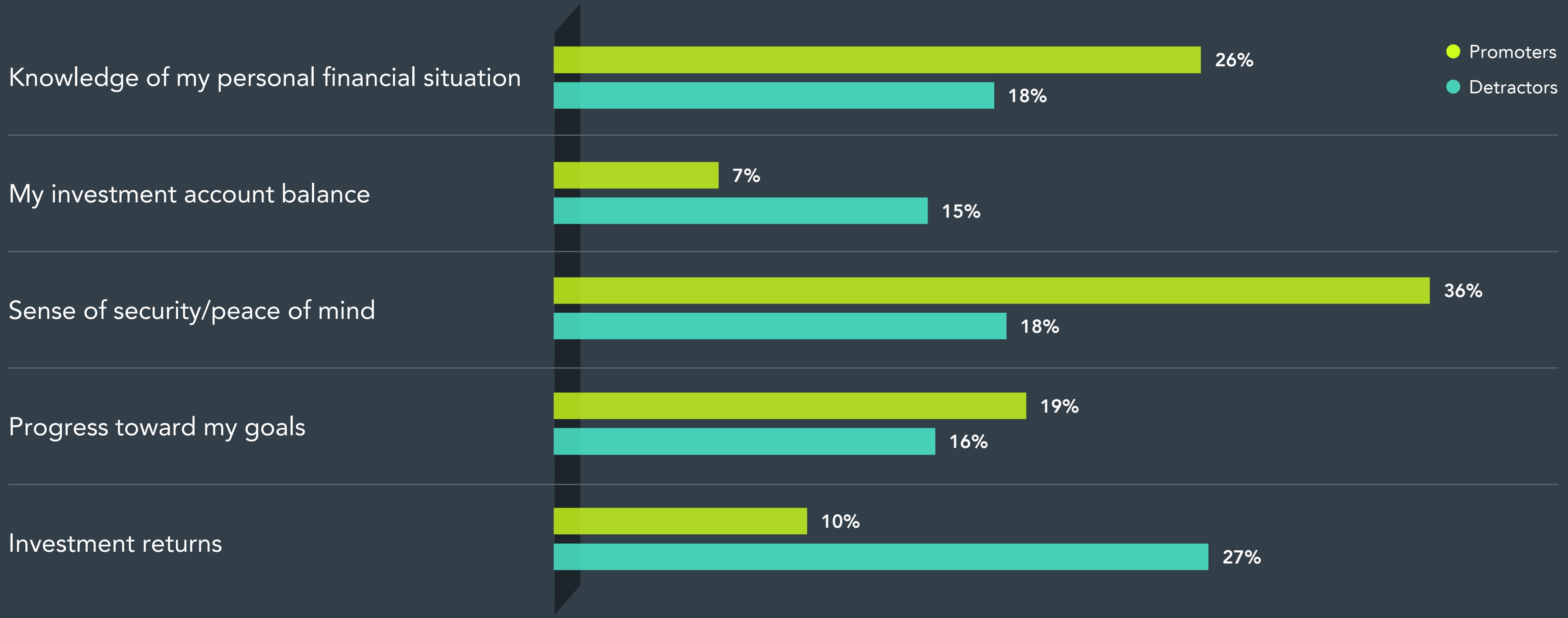
1.9
Virtual meetings

1.4
In-person meetings

Results from the Dimensional January 01, 2021 – April 30, 2026 Global Investor Study (43,750 clients.)

Measuring Advisor Value

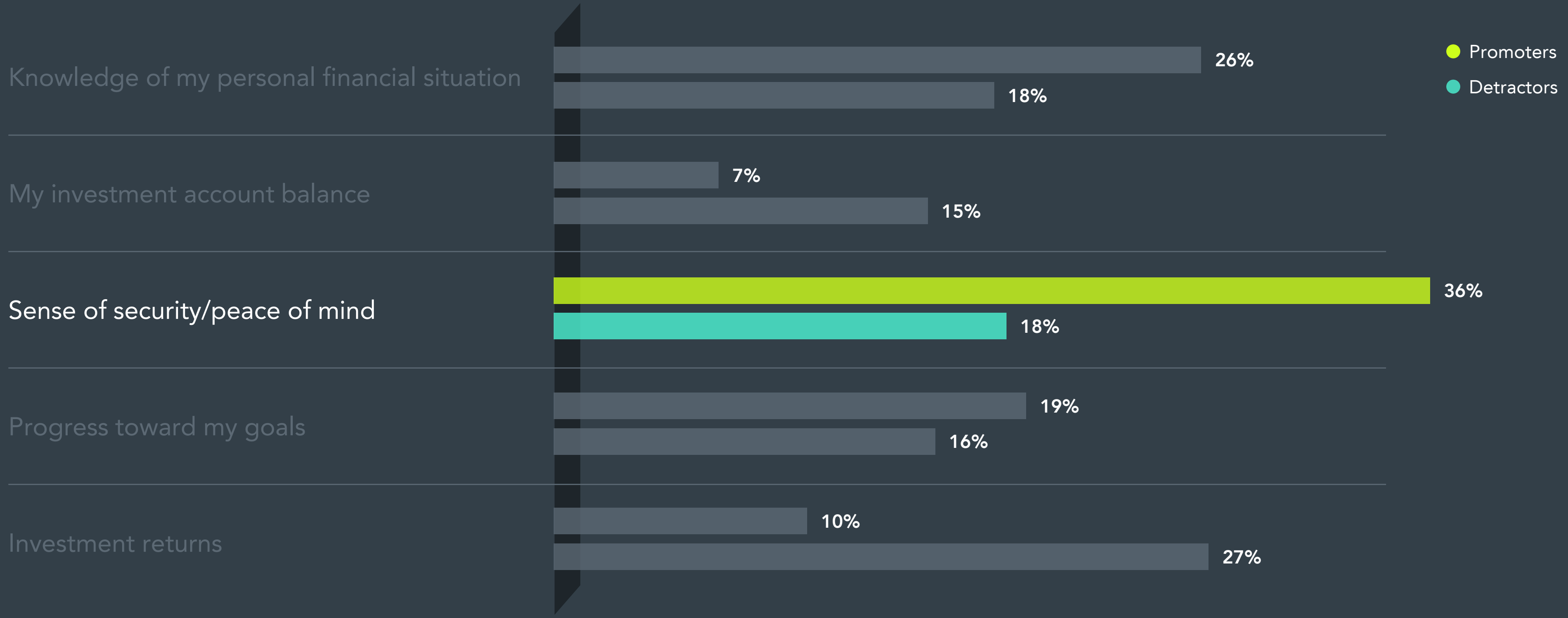
How do you primarily measure the value you receive from your advisor?



Results from the Dimensional January 01, 2021 – April 30, 2026 Global Investor Study (43,750 clients.)
35,872 Promoters. 1,851 Detractors.

Measuring Advisor Value

How do you primarily measure the value you receive from your advisor?



Results from the Dimensional January 01, 2021 – April 30, 2026 Global Investor Study (43,750 clients.)
35,872 Promoters. 1,851 Detractors.

Sense of Security/Peace of Mind

Dimensional

What does sense of security/peace of mind mean to you? (Select all that apply.)

RANK	
1	Being able to maintain my lifestyle
2	Access to expertise for all financial matters (investments, planning, taxes)
3	Having a trusted partner to navigate life’s financial challenges and opportunities
4	Not running out of money
5	Having a financial plan

Results from the Dimensional January 01, 2021 – April 30, 2026 Global Investor Study (43,750 clients.)

TENETS OF EFFECTIVE ADVISOR COMMUNICATION

Be Curious

Listen, if you want to be heard.

Be Aware

Know your audience and meet them where they are.

Be Engaging

Content and delivery: what you say, how you say it .

Be Prepared

The 4S Framework

For illustrative purposes only.

Dimensional

DIMENSIONAL 4S FRAMEWORK®

for effective client communication

SCRIPTS

STORIES

SKETCHES

SUPPLEMENTS

Dimensional

DIMENSIONAL
4S FRAMEWORK®

for effective client communication

SCRIPTS

STORIES

SKETCHES

SUPPLEMENTS

Scripts

Preparing for success

Important client conversations

Common client questions

Common Client Questions

- How do you describe the value of an advisor?
- What do I get for the fee that I pay?
  advisor, custodian, asset manager
- Why this investment strategy?
  stock picking, indexing, factor-based investing
- Why is this part of my portfolio underperforming?
  small, value, international
- Why is my total portfolio underperforming "the market"?
- Why are we invested in fixed income?
  low/negative rates, rising rates, inflation
- Is now a good time to invest?
  economic, political, record highs, etc.
- How do we respond to the "crisis of the day"
  pandemic, Russia, etc.
- Shouldn't we invest in ….?
  gold, bitcoin, rental property, etc.
- How can we align my values and my investments?

Dimensional

SCRIPTS

STORIES

SKETCHES

SUPPLEMENTS

DIMENSIONAL 4S FRAMEWORK®

for effective client communication

The Power of Stories

Three types of stories

The Story

"The reason I got into this profession was ………"

The Analogy

"Your money is a little bit like a bar of soap ………"

The Example

"Do you remember the company GameStop ………"

Dimensional

SCRIPTS

STORIES

SKETCHES

SUPPLEMENTS

DIMENSIONAL 4S FRAMEWORK®

for effective client communication

The Power of Sketches

The evolution of human communication through sketches

El Castillo and Altamira Caves

Cantabria, Spain
c. 42,000 years old

Temple of Philae

Aswan Cataract Egypt
c. 2,500 years old


Average Annualized Returns
After Market Decline of More Than 10%
S&P 500, January 1926–December 2024
Annualized Compound Return
15%
10%
5%
0%
11.7%
10.3%
1-Year
Look Ahead Period
3-Year
Look Ahead Period
Average Annualized Returns
After New Market Highs
S&P 500, January 1926–December 2024
Annualized Compound Return
15%
10%
5%
0%
13.7%
10.6%
1-Year
Look Ahead Period
3-Year
Look Ahead Period
Manage Your Emotions
Avoid reactive investing
ELATION
NERVOUSNESS
OPTIMISM
OPTIMISM
FEAR
Many people struggle to separate their emotions from investing. Markets go up and down. Reacting to current market conditions may lead to making poor investment decisions.
For illustrative purposes only.
Dimensional

Dimensional

DIMENSIONAL 4S FRAMEWORK®

for effective client communication

SCRIPTS

STORIES

SKETCHES

SUPPLEMENTS

Dimensional

DIMENSIONAL 4S FRAMEWORK®

for effective client communication

SCRIPTS

STORIES

SKETCHES

SUPPLEMENTS