

# Helping Advisors Support Their Clients And Evolve Their Businesses During A Global Crisis

How Graham Media Partners Teamed Up With Investnet To Deliver An Advisor's Playbook For A Post-COVID-19 Environment

## Overview

Investnet is a financial services company whose mission is to empower advisors and financial service providers with innovative technology, solutions, and intelligence to make financial wellness a reality for everyone. As of February 2021, over 106,000 advisors and more than 5,100 companies leverage the Investnet platform to grow their businesses and client relationships.

As the COVID-19 pandemic took hold in March 2020, Investnet took swift action to find ways to leverage its unique perspective to help advisors and their clients move forward at such a critical turning point and in the face of extreme market volatility, economic unease, widespread job loss, and mounting uncertainty.

## Solution

- ✓ Investnet wanted to compile a Playbook detailing how it believed the financial services industry would change because of the global coronavirus pandemic and actions advisors could take to position themselves as essential and trusted partners.
- ✓ Graham Media Partners supported the strategy, content, and design of the Playbook, working closely with Investnet's in-house marketing team, leadership team, and agency partners. The iterative process included a comprehensive review of research relevant to the topic at hand to provide context for the situation, while compiling key information into six trends with takeaways for advisors to use to differentiate themselves, better serve their clients, and build more sustainable practices.
- ✓ The outcome was a PDF analysis, ["The Advisor's Playbook for Leading Clients Forward,"](#) that was easy to consume, visually compelling, and immediately actionable. Included was advice on how to shift communication tactics, an emergency checklist for advisors to review with their clients, and opportunities to maintain, and grow, a sustainable business as advisors looked towards the future.

**INDUSTRY:** Financial services/  
Fintech

**SIZE:** Large

**SERVICES PROVIDED:**

- Strategy & project management
- Research
- Copywriting
- Graphic design
- Social media & ads

**RESULTS:**

1. Distributed to 106k+ advisors
2. 500k+ impressions on social media
3. Led to multiple media interviews, bylined articles, and press mentions

- ✓ The Playbook was distributed to all advisors in the Envestnet network and made publicly available for download. Additionally, the Playbook was used in webinars, videos, media opportunities, and social media to increase reach and engagement.
- ✓ The Playbook continues to be updated to reflect evolving information and empower advisors to thrive in a new world.

### Examine your clients' situations through a total wellness lens.

COVID-19 has opened up client anxieties about health and the future.

Moving forward, the answer to the question, **"Will I be okay?"** will have to encompass physical, emotional, and financial wellness.



Understand clients' unique concerns related to their health and finances.



Leverage technology to consider and plan for various outcomes.




Focus on providing unified advice that considers the full scope of clients' financial wellness.

### Understanding family dynamics can be a large part of the value advisors deliver.


Whether helping clients see the impact of overspending or showing them how their retirement will be affected if they continue to support adult children, financial advisors can help consumers avert a slow-motion disaster before it occurs.




## Select Results



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## A Trusted Partnership

During the pandemic, more than ever, investors needed seamless, timely guidance and support from someone they could trust. Envestnet's Playbook offered forward-thinking advice combined with compelling data to help advisors navigate the challenges and opportunities of a unique time.

Our team provided flexibility, quick turnarounds, and comprehensive support to help bring the Playbook to life. We were able to continually drive engagement to the Playbook, keeping advisors abreast of what a post-COVID-19 work environment could look like and continue to position Envestnet as a thought leader in the financial services industry.

To learn more about Envestnet, please visit [www.envestnet.com](http://www.envestnet.com).

Learn how Graham Media Partners can help you execute marketing initiatives that deliver results.  
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