

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

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

Overview

Envestnet 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 Envestnet platform to grow their businesses and client relationships.

As the COVID-19 pandemic took hold in March 2020, Envestnet 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

- Envestnet 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 Envestnet'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.



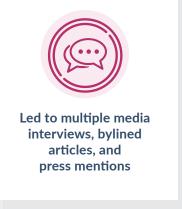


Select Results





social media



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.







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