Concentus
Wealth Advisors

Driving Leads with a Comprehensive Promotional Plan

How Graham Media Partners Helped Concentus Wealth Advisors Launch Its CEO's Third Book

Overview

As CEO of Concentus Wealth Advisors, Erik Strid is committed to helping his clients achieve their financial goals. In addition to working with clients, Erik also shares his expertise more widely in a series of books he has authored.

His latest installment, *Exploring*, provides retirees with a roadmap for navigating the challenges and opportunities of this stage of life.

While his first two books were well-received, Erik and the Concentus team believed *Exploring* would have widespread appeal for baby boomers and wanted to craft a plan to promote the book among both clients and prospects, driving leads for growth.

Solution

As its ongoing marketing partner, Concentus leveraged the Graham Media Partners team to tackle the project. The team had supported the previous book launch, *Clarity*, and applied those lessons learned in developing a five-month, multi-touch plan and timeline to generate awareness and interest in the book, host a launch party, and provide continued follow up with clients and prospects.

✓ PROJECT MANAGEMENT

Coordinated the project with the Concentus team, a public relations partner, and an advisory firm to align workstreams and meet milestones to ensure projects were completed on time and as expected.

✓ EVENT PLAN

Drafted an event plan, including date, venue, agenda, and client guest list. Helped execute key event details and attended the event to help set up and tackle any on-site challenges.

✓ SOCIAL MEDIA

Produced ongoing social media posts on major platforms, including LinkedIn, Twitter, and Facebook, to promote the book and its launch party. Created an online survey to track interest in the book's topic and provided post-event gated content to track leads.

INDUSTRY: Financial services

SIZE: Small to midsize

SERVICES PROVIDED:

- Marketing planning and execution
- Project management
- Social media
- Email campaigns
- Website design
- Event planning

RESULTS:

1. 100+ attendees
2. 300+ books distributed
3. Opportunity for in-person conversations with prospects and clients

✓ EMAIL CAMPAIGNS

Crafted a schedule of ongoing email outreach, from both the company and Erik Strid personally, to promote the book and the event.

✓ WEBSITE DESIGN

Helped create a dedicated landing page featuring a video, an overview of the book, related guides, an online assessment, and a lead capture form.

✓ BRANDING AND DESIGN

Designed the book cover, event signage, giveaway items, and branded promotional collateral to include with the book and distribute at the event.

"The book launch party was a great event. With Graham Media Partners' help, we had a significant turnout and received a lot of positive feedback from attendees."

- Erik Strid, CEO, Concentus Wealth Advisors

Select Results

The interest generated by the promotional plan, which included local news coverage, exceeded the expectations of the Concentus team. The launch party attracted 100 attendees, including many prospects interested in learning how to make the most of retirement, which led to the distribution of over 300 books, opportunity for conversations between current and prospective clients, and enabled the Concentus team to position themselves as retirement experts to attendees.

Planning For The Future

Thanks to strategic planning and execution, this launch was deemed the most successful of Erik's three books. Following the completion of the campaign, Graham Media Partners and the Concentus team evaluated its success, identifying best practices to apply to future initiatives to promote Erik's authorship and expertise.

"We had a great book launch for *Exploring*, and the GMP team contributed greatly to our success. They do an amazing job for us, and we are very thankful for their partnership. We are looking forward to many successful years together."

 - Paul Strid, Founding Principal & COO, Concentus Wealth Advisors

To learn more about Concentus Wealth Advisors, please visit www.concentuswealth.com.