

Reshaping the Narrative

How Petri Group Built an IMO's Compelling Recruitment Story

CHALLENGE

An unclear message and limited marketing support impeded the client's ability to recruit advisors and BGAs.

SOLUTION

To understand what made the client better than their competition, Petri Group conducted one-on-one interviews with existing BGAs and key financial advisors to uncover the client's unique offering and why advisors like working with them. We used this information to create a value proposition and key messaging that told a cohesive story across the supporting materials including:

- Revamped website
- Brochures
- Targeted emails
- Advisor testimonials

RESULTS

- Clarified the marketplace position
- Established a strong and organic value proposition
- Enhanced recruiting and acquisition opportunities

Work with us to define, elevate and propel your business to new heights.

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