

# Value Unleashed

How Petri Group Showcased a BGA's Unique Value-Added Services

## CHALLENGE

The client's messaging missed the mark on conveying their value for the advisors who worked with them. As a result, their recruiting and growth goals were not being met.

## SOLUTION

Petri Group performed a thorough audit of existing messaging, content and collateral. We followed that with a series of in-depth conversations with the client to understand how they worked with advisors and what value-added services they delivered. We distilled the information to create a powerful and distinctive value proposition and key messaging which we carried throughout supporting materials:

- Company overview
- Pitch deck
- Refreshed logo
- Series of market briefs highlighting expanded value added services and support to advisors
- Videos and one-pagers for advisors, focused on trending topics

## RESULTS

- **Increased sales and revenue** with clear and concise messaging
- **Strengthened market position**
- **Improved advisor recruitment**
- **Positioned client for a successful strategic acquisition** leading to market expansion

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

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