



SURPRISE, DELIGHT, AND DELIVER THE UNEXPECTED

A Case Study on Advisor Group's
Enterprise Marketing Solution



Advisor Group is one of the nation's largest networks of independent financial advisors, overseeing more than \$450 billion in client assets under administration. Their mission is to inspire and equip the hero in every financial advisor and acknowledge their profound importance in people's lives.

“My passion is to create scalable solutions to deliver meaningful experiences, creating referable moments that drive an advisor's business.”

Susan Theder

Chief Marketing Officer, Advisor Group

Advisor Group Challenges

As an industry leader, Susan Theder, Chief Marketing Officer at Advisor Group, knew all too well that poor communication was the top reason clients fire their advisors.

Susan recognized that Advisor Group advisors were using a variety of different tools and fragmented approaches to marketing communication that simply weren't working. Advisors didn't have access to compliance-friendly content and were creating their own pieces, overwhelming the compliance team with submissions.

She also knew that a sustained marketing communications effort requires a great deal of time and expertise, and without automation and ready-to-send content it simply was not possible for a busy financial advisor.

Susan believed in the value of an enterprise white-label solution where Advisor Group could own the IP, customize the functionality to fit the needs of their advisors and their own marketing team, and have the flexibility to continually enhance it over time. It was also important for this to complement the efforts of their internal marketing consultants, empowering them with a tool to create and publish custom content with an easy, turnkey compliance workflow for analysts to review.



The Solution | MyCMO

After extensive vendor evaluation, Susan selected FMG Suite as her partner and together they customized the FMG Marketing Suite enterprise solution to build MyCMO.

Advisor Group selected FMG Suite because of its superior technology chassis, the quality and diversity of the automated content (video, infographics, quizzes, articles, etc.), and the ability to have 1:1 communications through a multi-channel strategy.



**Pre-approved
Content Library**



**Set & Forget
Campaigns**



**Printed
Greeting Cards**



**Pre-built
Event Kits**



**Built-in Compliance
Workflow**



**CRM
Integrations**

MyCMO is a powerful marketing resource with everything from digital content to social media to printed greeting cards—in one simple, user-friendly interface. MyCMO includes more than 1200 pieces of content, featuring a mix of items created by FMG Suite and Advisor Group's in-house team of marketing experts. Advisor Group uses the FMG Suite Publisher tool to add their custom content into MyCMO—making it readily available for their advisors to share through emails, social, and their websites.

MyCMO empowers advisors to easily deliver highly-personalized marketing campaigns at scale that surprise, delight, and deliver the unexpected to clients and prospects.

“ It takes time and effort to build deep, strong relationships, and advisors need help doing this in a scalable and authentic way. MyCMO breaks new ground and we’re excited to be able to help our advisors with such a critical element of their business.”

Susan Theder
Chief Marketing Officer
Advisor Group



MyCMO Results

Advisor Group has seen tremendous results for their advisors and the company as a whole.

Advisors love MyCMO because it allows them to:

- ✔ Create a polished digital presence
- ✔ Build deeper client relationships
- ✔ Drive more referrals
- ✔ Remain top-of-mind with clients with minimal effort
- ✔ Save a ton of time

MyCMO is a key element in supporting the Advisor Group brand, “IN YOUR CORNER.”

It’s a unique differentiator that enables Advisor Group to:

- ✔ Attract new advisors
- ✔ Increase advisor satisfaction and retention
- ✔ Achieve efficiencies for their Compliance team with fewer compliance submissions
- ✔ Increase advisor GDC (based on early indicators)

“ We wanted every advisor to be able to use effective, personal, one-to-one communications to grow through referrals, and MyCMO is helping achieve that goal.” - Susan Theder

KPIs

ADOPTION

20%

within 1 year

EMAIL CAMPAIGNS

4-5

per advisor

REACH

500K

investors monthly

SOCIAL POSTS

11K

in one month

The Future of MyCMO

FMG Suite and Advisor Group are innovating together. Moving forward, they will continue to create content and unique capabilities to meet broader use cases for advisors. They are evaluating new features, developing more content and campaigns, looking into creating even more personalized automated sequences, and other enhancements that continue to make it easy for advisors to build their digital presence and grow through personalized, 1:1 communications at scale.

Quotes from MyCMO Advisors

"MyCMO is my own chief marketing officer. It does the heavy lifting and allows me to do what I love, meet with clients. It is a 'set it, forget it' feature that makes you look on top of your game in email, social media, and cards. You appear genuine, on target, timely, and thoughtful."

"During the first 6 months, I had 88 client engagements which gave me \$40,000 in GDC and added more than a million in Advisory biz!"

"I believe that 'great' businesses do things differently than 'good' ones. I can confidently state that MyCMO can transform your business into a GREAT ONE!"



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