

Investnet: What's the best way to inform advisors of the "new standard for advice" that is now available to incorporate into their practice? Hire a partner that helps you connect with your audience and demonstrate your value in an engaging way.

Challenge

Investnet approached s2 with the challenge of helping them introduce their newly enhanced platform features and upgraded functionality. Targeting their RIA and independent advisor base, they wanted to do this in a way that would connect with advisors and not just come across as a sales pitch to upgrade. They also didn't want to degrade the functionality of their existing platform, since many clients would continue to use it. The messaging needed to reinforce Investnet's expertise in serving advisors and understanding what advisors need next in their practices.

s2 Response

We responded by crafting a copy structure that would not only explain the utility and benefits of the platform's key features, but would also convey how the platform aligns with what advisors need today and anticipates what they will need tomorrow. From there, we began a full-court press on engagement. Using an interactive "click wheel" to highlight each aspect of the platform's offerings, we developed an effective visualization of the new experience that awaited advisors, showcasing its value to advisors as well as the robustness of Investnet's solution. This display will be used as a means of introducing primary benefits, and as a way to reinforce core messages throughout multiple types of interactive and static communications.

To support the educational aspect, s2 developed a series of powerful, informative video demos featuring key strategic issues for which advisors would welcome integrated solutions. The site housing the demos provides multiple contact points with Investnet, such as upcoming events, marketing materials, and traditional contact methods.

Results

Management was pleased with the direction, level of engagement, and clear portrayal of the differentiating features. Feedback from the sales team was also positive.



Events page



Site demo



Landing page