

Case study: **Blueprint Financial Services**



The Challenge

As a young financial services company, Blueprint established a high class network of financial advisers, who have rapidly established themselves within a competitive market. Having reached their initial objectives, the company needed to begin building the brand and promoting the full range of services offered through the adviser network.

The Objective

To attract new advisers to the business by providing a strong marketing support programme for the advisers. Also, to enable advisers to cross sell new products to existing clients.

The Result

Having worked with Blueprint over a number of years to develop new literature, we then developed the long term strategic approach. Key to this was a programme of bi-monthly client communications to prospects and clients.

The result has been a dramatic increase in client awareness of the full range of products supported by Blueprint and an increase in sales for the adviser network. The programme also meant that both the advisers and Blueprint were talking to their clients on a regular basis and informing them of new products and opportunities, thus increasing their sales.

“As a young company we were at a point where we needed advice and support to develop new marketing activity to continue to grow. EWO have given us this resource and have continuously developed activity to meet our needs. The results have been very good with our team of advisers seeing immediate results from the activity.” **Stuart Cross, Sales Manager**

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