



## CHALLENGE

# Build Client Relationships and Grow New Business Referrals

Financial Advisors are busy helping clients achieve their long-term financial goals day-to-day, and marketing and planning for the future of the firm is an important way to ensure long-term success. Without properly planning and marketing, Financial Advisors can get stuck in the everyday rut that makes it difficult to grow revenue and expand the business over time. Without growth, old clients that peel away are not replaced, and business is lost to competitors.

To help ensure a successful future for their financial advisory practices, Morgan Stanley needed a strategy to meaningfully engage and connect with clients and grow new business referrals. In 2014, Sprocket Media stepped forward with a vision and strategy.

# SOLUTION

## Mosaic Account Based Engagement (ABE) Platform

We quickly realized that the busy Financial Advisors needed a turnkey solution to seamlessly serve up stunning and well positioned touch points for their target accounts and generate new leads. So, we got to work for Morgan Stanley building an Account Based Engagement Platform that included a new publication titled Mosaic, a website, and a private Portal where advisors could manage their personalized design elements, build targeted messaging, and manage their recipient lists. The Portal was developed with an intuitive user interface, AI, and powerful security architecture.

To engage and grow the audience quickly, Sprocket wanted to craft the compelling lifestyle content and design of Mosaic magazine to the highest level. Mosaic would be the central component of the ongoing client engagement strategy. To this end, as we entered the pre-launch phase, extensive focus groups were conducted.

With the help of Morgan Stanley, the focus groups were organized and initiated over the course of a month-long period.

The feedback was beneficial in many ways, of course, but most specifically in helping Sprocket focus the editorial and design elements. We also learned that advisors hoped Mosaic would reach their client's children and grandchildren, who were often grouped into the 'Millennial' demographic.

Sprocket proudly launched Mosaic in both print and digital formats. Strictly a lifestyle publication with an emphasis on all things experiential, Mosaic is delivered exclusively to Morgan Stanley Advisors and their clients six times each year. The glossy publication offers multiple options for personalization and customization by the advisor, including name on the cover, a personalized message to clients on the inside front cover, photo on the inside front cover—and all of this information is repeated on a tear-out-card that backs one of four recipes available to further customize each issue based on personal taste, which serves as the perfect, non-financial touch point to stay top-of-mind.



# RESULTS

## Targeted Account Management and New Business Growth

Timing our launch for the spring of 2015, we published an issue based on the theme of the season: renewal and rebirth. In just the first month, 350 advisors had signed up on the platform, and we felt like we'd done a great job of building our base of subscribers, exceeding our initial expectations, mailing out 28,000 issues the first month.

**Morgan Stanley experienced phenomenal results, and their Financial Advisors received excellent feedback and grew to successful heights with the Platform. Here's what happened:**

Issues expanded from zero to more than **40,000** copies per issue in the first year

**91%** of Advisors passionately confirmed that it has been effective at strengthening relationships

Ad sales growth of **400%** in the 2nd year

Accepted prestigious **Maggie Award for Best Overall Lifestyle Publication, 2016**

## TO OUR CLIENTS' CONTINUING SUCCESS

With the success of Mosaic for Morgan Stanley, Sprocket soon started hearing from financial, real estate, insurance, and other business professionals with interest in a solution that they could use to engage their clients and prospects. So, in 2021 we launched the non-exclusive ONE (ABE) Platform. [www.one.sprocketmedia.com](http://www.one.sprocketmedia.com)

At Sprocket, our goal is to create engaging experiences that make an impact and grow sales. We developed the Account Based Engagement (ABE) Platform to be a practical solution that integrates key elements including compelling content and design, personal-touch messaging, ongoing touch points (six times per year), target account and data management, and analytics and reporting.



**Kyle Walkenhorst, Publisher**  
kyle@walkenhorstmg.com  
+1-323-228-3805