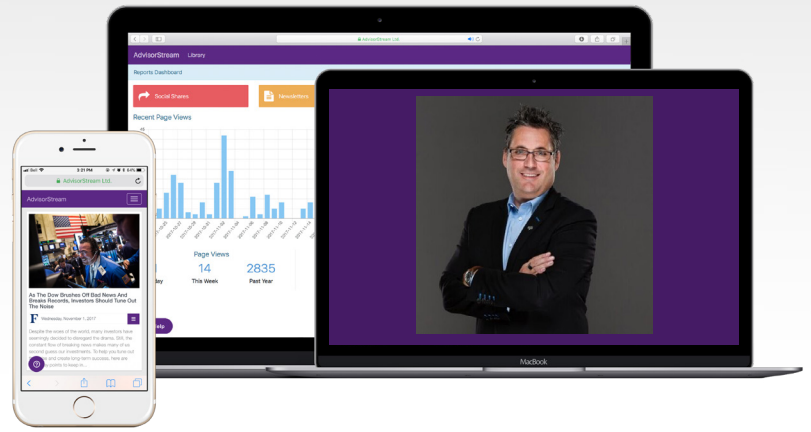


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Success Story



Rob Eby: How AdvisorStream Saved Me Hours Of Busy Work

Rob began his career with Investors Group in the information technology department. Over a 10-year period, Rob distinguished himself and rose through the ranks to become the Manager of Sales Technology Research, Development and Training at Investors Group. Specifically, he was responsible for the critical implementation and training of financial planning tools.

Rob comes from a legacy of financial planners. His grandfather, father and sister are all financial planners who have worked within the Investors Group community. Together they form a Financial Planning team that has over 120 years of experience with Investors Group.

“My Grandfather started with Investors Group in 1931 and worked for over 40 years. My father, Peter worked with Investors Group for 52 years, my sister, Charla has just over 20 years of experience and at present, I have accumulated 20 years with Investors Group.”

The Problem:

Marketing Efforts We're Too Time Consuming

Communicating with clients on a consistent basis was a lot of work. I couldn't find the time to write my own content. I found it to be way too time consuming and took time away from focusing on servicing my clients. Finding the right content that would meet my compliance requirements, as well as being relevant, became another challenge I was faced with. I always knew marketing was critical to my success as an advisor, especially in this new age where people communicate digitally. However, I was finding that all my time and efforts placed into marketing was a strenuous process.

I didn't want to simply automate everything and lose sight of what I was communicating. I still wanted to be involved in what I was sharing and communicating with my network. So, I strictly stuck to using my firm material; which was a safe bet, compliant and already done for me. However, it's important to note that the content I was using was not personally branded.

The Solution:

Branded Content Distributed Through All Channels

I truly cannot express how much time I have saved because of AdvisorStream. I've been using this service for well over a year now and have a steady stream of content sharing to my social media. I also distribute a weekly newsletter that contains valuable information for my clients and ensures they hear from me on a consistent bases.

AdvisorStream allows me to set, customize and control my social media automation. I appreciate the ability to review the content beforehand. This allows me to have control over what I am communicating to my clients and prospects, without doing any tedious work. It's also important to me because it ensures that the articles I share are tailored to my brand, my business, and my network. I am always adamant to share content that will interest my clients, so I really value AdvisorStream's ability to include a wide variety of relevant topics.

The content they offer is phenomenal and my clients love it. In my opinion, the content AdvisorStream offers is much more engaging than sharing a weekly commentary. Because the content I share covers a wide range of topics, my clients look to me as someone who is well informed. Not only is the content fantastic, everything I post is consistently automated across all my channels. By streaming branded communications to my digital channels daily, my content travels further and faster than it was before using AdvisorStream.

The content I share on social media and my weekly newsletter have truly opened up lines of communication with both my clients and prospects. Using AdvisorStream has helped facilitate and start conversations I wouldn't have on my own. The content really allowed me to break the ice and build new relationships. It has also allowed me to deepen existing relationships with my clients by sending them targeted communications. I am able to focus on developing my practice further, while still reaping benefits from consistent newsletters and social media posts.



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