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THE IMPORTANCE OF EVENT MARKETING

How to build an end-to-end event
strategy in financial services

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How to embrace event marketing and utilize the power of customer relationships.

Events for financial services professionals can create logistical headaches and inject a sense of fear into any planner's workload.

Large organizations already run events as a matter of course. But the underlying risk of a regular 'get-together' is that they focus too much on the mechanics and not enough on the longer-term value you can extract from a compelling story, beautifully told to a captive audience in a relaxed setting.

The push to digitize and automate the marketing process has great advantages. But to make it work you have to combine the benefits of rich data with something so much more valuable to customer relationships: the power of human interaction.



Seven steps to effective financial services events

Stakeholders are a tough nut to crack when you're trying to justify such a program of administrative heavy-lifting to reach out to your clients. But events are absolutely the gold standard of strategic content marketing.

An expertly executed event plan can (and should) be hardwired to your wider marketing efforts. It's the ideal opportunity for you to create a self-sustaining cycle of proprietary thought leadership content that can be strategically surfaced throughout the lifetime of any of your campaigns. Key events can only ever target the select few. However, resulting stand-out content can be campaigned out in a targeted way with significant reach. Not least, this can generate significant ROI from your budget.

01. Kick-start your conversation

First off, it's important to create the advance 'story' that gives you a reason to meet in an event setting. Set the scene by focusing on the biggest thought leadership issues within the financial services community. Are they exciting or even controversial enough to warrant customer engagement? If so, now is the time to build a buzz around those issues. You're the experts in your field, so why not shout about it?

02. Get them to crave the date

Your next two moves are crucial. Craft your most burning issues into the kind of hot topic that will leave customers and prospects in little doubt that they need to participate for the 'good of their business' or personal development. And if you have a well-functioning B2B contact strategy, you will then be able to target both your most established high-value customers and your warmest leads with a proposition they'll find hard to resist.

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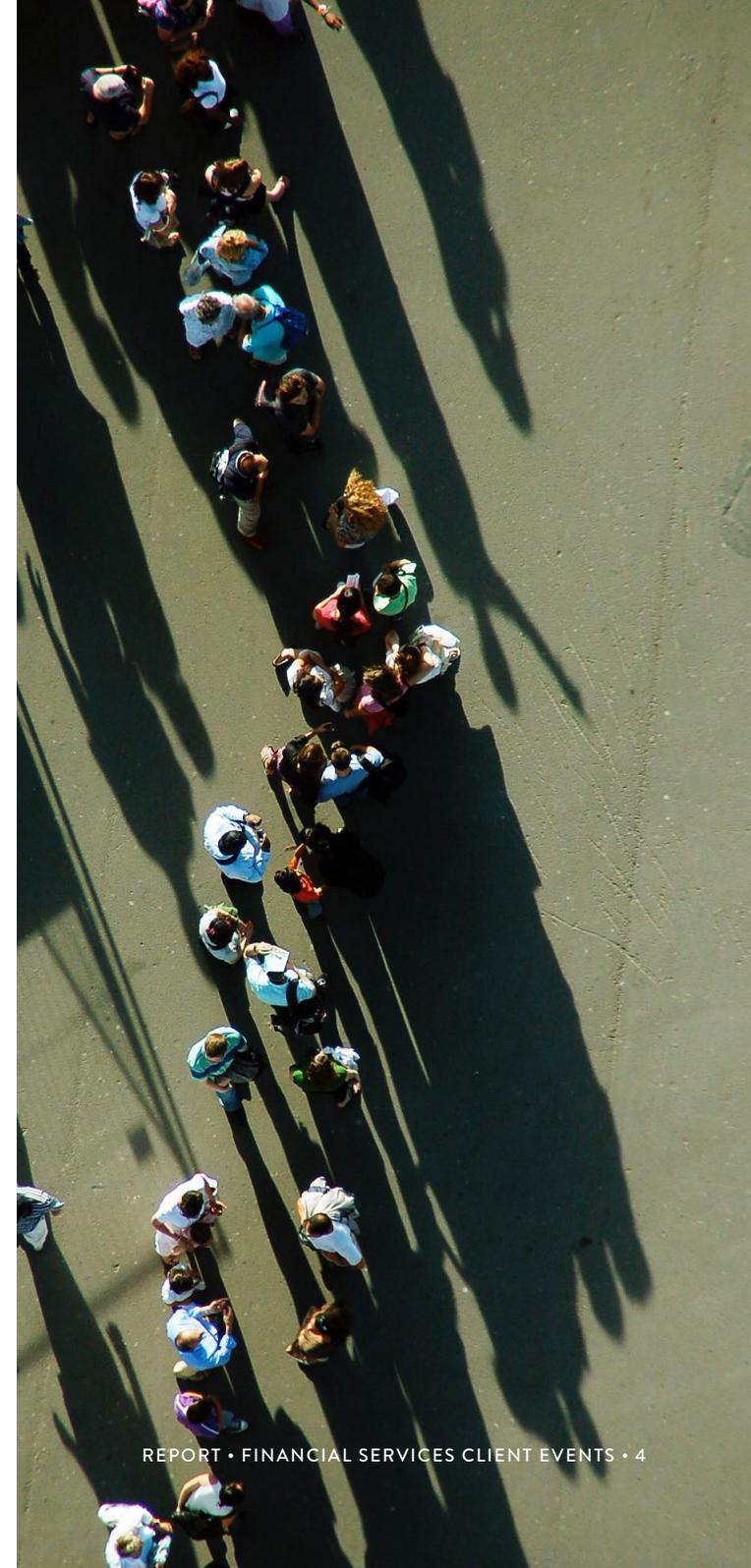
03. Identify your crowd-pullers

Choose your spokespeople carefully. As a business, you will have plenty of expertise to share at the event. But there's a fine line between providing helpful, valuable insight to delegates and presenting a flatly corporate view that ultimately fails to engage and inspire the audience. This is an opportunity to create structure and bring nuance to the debate with third-party industry commentators. Or you could invite representatives from recognized peer companies to offer their take on issues. These contributors don't necessarily have to be from within your organization, but if they have a strong message to send out they will be doing so in association with your brand and on your turf.

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04. Consider intersecting other worlds

Perhaps your brand is a sponsor of other events within other worlds: for example, arts and culture or sport. Rather than just focus on financial services themes, these can be interwoven with premium 'happenings' where both location and notable speakers from those arenas can give you real stand-out. This is where the event becomes an experience that you own. Your target audiences in financial services may be drawn to this rich and immersive type of event. This also gives you the perfect opportunity to have a subsequent high-profile content campaign theme.



05. **It's all about the exchange of ideas**

Once at the event, delegates will have expectations thanks to your pre-event marketing. They will also want to see a return on their time and effort. You can achieve this through smart, interactive structuring of your program.

The booking of one well-known and inspirational keynote speaker might help drive delegate attendance, but your core content opportunities will come from audience discussion, break-out sessions, live polling and exercises rather than a series of 'lectures'.

Most importantly, somebody should be getting all this down. Film the event, if the budget allows, or use professional writers tasked with covering all sessions.

06. **What did we all learn here today?**

One of the best outcomes of the event is that the original theme has taken a different turn. If delegates have shown a willingness to participate, you will be the curators of large quantities of owned content: opinion,

independent reaction, polls, fresh insight, commentary from industry, business and experts.

The buzz that was created around the build-up to your event has now moved up several levels and it all effectively happened under your roof. So, what are you going to do about it?

07. **Spread the word, and quickly**

In the short-term, post-event customer relationships and discussions will be significantly richer and valuable to both sides. Your content marketing strategy can now trigger a fresh cycle of conversation with engaged customers. This is why it's important to seize the moment with a follow-up content plan.

Remember all those customers you invited but couldn't make it? You can start the CRM process again with a fresh take on your industry issues that will be the ideal way to pull them in to your next event.

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Ready to talk?

Who we are

Editions Financial is a global content marketing agency dedicated to financial services. For 20 years, we've created content for the world's leading financial services organizations, helping marketers send the right messages to the right audiences at the right time. In the past four years alone, we've successfully delivered more than 3,000 content projects for leading global financial brands.

We can help you

Brands that pay the closest attention to how varied audience segments think and feel about their finances and use content to address their needs effectively are in the best position to benefit from their value. If you're looking for insight-rich, purpose-led, high-impact content that gets results, please get in touch.

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