

client case study:



LPL Financial Group created a new suite of technology tools to help its nationwide team of 13,000+ independent financial advisors perform their services at unprecedented speeds, streamline complex operations, cut down on paperwork, and offer complete transparency for their clients.

challenge:

The significant investment in this "LPL Advisor Tech" initiative needed an appropriate level of fanfare. LPL had one chance to get their brokers and stakeholders informed and excited about their new software tools and had to get it right.

obstacle:

The target audience is traditionally wary of solutions and promises emanating from the "Home Office." We needed to overcome built-in skepticism and generate some product momentum in advance of an important annual trade show. Tight production schedule, as there was only 18 days for concept thru completion before the start of the trade show event.

solution:

Creative Image built out an integrated program featured in a new, stand-alone website dedicated to the new tools and promoted it to the LPL Advisor community with tactics including direct mail and online contests for sign up/adoption in advance of the company's annual trade show. The content was then extended to the event itself in the form of signage, meeting rooms dress, show collateral, premium items, and more.



Direct Mail:

Based on the concept of saving time with LPL's new software products, we created clocks with an extra hour on them and mailed them to a select list of influential advisors.



Web Design:

A stand-alone microsite designed to convey the news and excitement of the new product while remaining true to overall brand standards. The site was designed specifically to incent trial and sign up for the new products. [LPLadvisortech.com](http://LPLadvisortech.com)



Trade Show Experience:

Created a series of meeting room dress, directional signage, premiums, and other event-related items to extend awareness across all aspects of the trade show.



Sell Sheets:

Product and program specific sell sheets carrying over the main program theme for the distribution at the event.



Display Ads:

We created display ads based on the program theme and placed them in strategic locations within the trade show web portal, linking them to the newly created microsite.



Corporate Brochure:

We created an offline identity for the new product suite as well in the form of a "LPL Advisor Tech" focused brochure.



- Developed a conceptually driven program to present new technology.
- Designed and implemented 360 degree communications program.
- Created trade show takeover of break-out rooms placing clocks with extra hours on walls.



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