Alchemer
Formerly SurveyGizmo

CASE STUDY: CEG WORLDWIDE

Automating Tools And Resources

CEG Worldwide Automates Financial Advisor Tools and Resources with Alchemer

CEG Worldwide is the #1 coach for top financial advisors. One of CEG's offerings is a turnkey business development program that systematically delivers high-quality thought leadership content, along with tools and guidance for customizing and distributing it to clients, prospective clients, and centers of influence. In 2016, CEG turned to Alchemer to replace their survey solution and got a lot more. Using Alchemer, Heather O'Donnell, Senior MIS & Project Manager at CEG Worldwide, and her team created an assessment, advisor portal, and resource library that automated much of the onboarding and marketing needs for their financial advisor clients.

Originally Alchemer was brought in as a survey solution, but Heather saw the possibilities. "I realized that Alchemer was what we needed to solve a problem to be able to automate our content." Using Alchemer, Heather created a library that automates many of the marketing activities for CEG's clients.

ALL ABOUT AUTOMATION

"I'm all about automation," says Heather. "It saves time and frees you up to do other things or bigger work." When an advisor initially engages with CEG, they complete a survey with their business information, their own logos, headshots, colors, and other easy customizations. They also get a custom-content account stored in Alchemer that is integrated with their CMS. The data they submit through the onboarding survey is then used to automatically customize marketing materials for the advisors to turn around and easily share via email with their clients.

FLASH REPORTS

The Flash Report is an automated newsletter connected to the CEG Worldwide CMS and back to Alchemer that the financial advisor can create in their portal. The report pulls from years of evergreen articles created by CEG Worldwide that prepopulates an email with information the advisor gave during onboarding. The solution then produces a PDF for them to email to their clients. The way Heather and team have set it up, they even tell people how to use the report for this month, making it turnkey for their financial advisors to serve their clients. "Alchemer auto-pipes the information from the onboarding survey that the advisor completed to customize the newsletter."

SPECIAL REPORTS

The wealth managers also have access to evergreen articles. Again, they can customize these, add their photo, and the system generates an email and a link the advisors can share with their clients.

> "Alchemer is incredibly robust, and I get to customize Alchemer the way I want, without limitations."
>
> Heather O'Donnell,
> Senior MIS & Project Manager,
> CEG Worldwide, LLC

Alchemer is kind of like the Holy Grail for me.

“Alchemer allows the machines to work for us, so we don’t have to work like machines. It saves us all time, and that’s huge. This is why I’m all about automation. Alchemer is kind of like the Holy Grail for me. I love all-in-ones.”

Heather O’Donnell,
Senior MIS & Project Manager, CEG Worldwide, LLC

MAKING IT WORK

“Alchemer gave us every single thing we needed,” says Heather. “We created a plan, tested out the tools and systems, and developed the tools to make it all work within Alchemer.” The Alchemer open API and custom scripting allow CEG Worldwide to make the solution work in unique ways. “I like that I get to customize Alchemer the way I want. I can mash up the smaller things or connect through the API.”

ASSESSMENTS

When a financial advisor signs on with CEG Worldwide, they take an assessment (in Alchemer) to determine their aptitude for wealth management. Based on their answers, the prospect is sent to a pre-determined landing page where they receive a recommendation report directly from the assessment. With the assessment, CEG Worldwide creates a Total Advisor Profile, or TAP, that determines where prospects are as wealth managers. This allows CEG Worldwide to focus on those with the right skills and experience to be wealth managers while giving others a clear path to becoming one.

LIBRARIES

When an advisor signs on, CEG Worldwide sets them up with a custom content account stored within Alchemer. The CEG team then guides the financial advisor on how to use the libraries. The financial advisor then accesses the library of articles they want, and the system compiles the relevant articles into a digital flip book that the financial advisor can send to their clients.

“People don’t understand how to use libraries of content unless you show them,” explains Heather. “So they need the training, alongside the library. The sales team was excited about the library because it evolves and is also evergreen,” explains Heather. “We create six articles a month, and there are numerous years of evergreen articles in the archive as well.”

ABOUT CEG WORLDWIDE

CEG Worldwide helps financial advisors accelerate their success as they build simple, elegant wealth management businesses that are indispensable to the right affluent clients.

Guided by our programs, advisors build and enhance their practices in the three areas essential for moving to the highest levels of success:

1. Clarity of intention. Advisors define their most important goals, implement the business model that will help them achieve those goals, and determine the types of clients they are most committed to serving extremely well.
2. World-class client experience. By implementing proven wealth management and wealth planning processes grounded in a deep discovery process that wins client loyalty, advisors are able to provide a client experience that few competitors can emulate.
3. Wealthy client pipeline. Advisors move from a hit-and-miss source of new clients to a steady, reliable stream of affluent prospective clients by building – with centers of influence – strategic partnerships anchored by economic motivation to build mutual success.

The result for advisors? Wealthier clients, significantly greater assets under management, and, most important, the ability to lead a life of true significance that is supported by their practice.

Visit CEG Worldwide at cegworldwide.com.

Call your account manager or 800.609.6480 to learn more.

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