

The Wealth Check – Global Content Creation and Delivery

Event Date: Thursday 22 March 2017

Hosted by UBS Wealth Management

By Jasmine Butler-Burnham, The Financial Services Forum

In recent years, marketers have come under increasing pressure to create and activate 'great content'; research or opinion pieces that are both engaging and unique, whilst delivering on business objectives and demonstrating the expertise of the firm.

But with multiple publications – and competitor businesses – also vying for the attention of clients, achieving cut-through in a crowded room can be tricky. Perhaps even more so when the audience you are attempting to capture are UHNW individuals with limited time and specific interests.

On Wednesday 21 March, Members were joined by Kirsten Burt, Head of Marketing, UK & Jersey at UBS Wealth Management, Mike Sergeant, Headland Consultancy and Aine Bryn, Marketing Director, Global Clients and Markets, Financial Services, PwC for a breakfast briefing kindly hosted by UBS, to pick up tips on how to curate content that has impact

Having recently collaborated on UBS / PwC Billionaires Report, the panel were well placed to provide insight on how members can ensure that content achieves return on investment.

Here are our key insights:

- 1) **Co-create. Involve clients and colleagues in the research and curation processes.**
People love to share their opinion and it will also help to generate a 'buzz' around the findings when they are published.
- 2) **Topics should address a global subject or issue that has local implications.**
To assist relationship managers with discussing key points with specific salience to their clients, a brief containing insights and questions from the research can help to initiate conversation.
- 3) **Ensure business objectives remain at the core of the content. Is the narrative bold enough to grab the audience's attention - and is the call to action being clearly articulated?**
Remember that the audience do not have the time to invest in reading a 1000 word report. Content must be direct, distinctive and purposeful.
- 4) **Know how you will measure success.**
Set KPI's from the outset and continuously reflect on your goal throughout the project, ensuring that objectives have not been lost. The interpretation of 'success' should be defined at the beginning of the project, allowing you to work backwards.
- 5) **Ask if the content 'has legs' – for both internal and external stakeholders.**
Seek feedback from the salesforce and continue to proactively follow-up, measuring reception. Remember that seeking feedback should not be a case of 'speak now or forever hold your peace'..!
- 6) **Plan your activation cookbook.**
What mediums will you use to activate the research across media, marketing and the salesforce? And is the supporting content channel-appropriate? Infographics look fabulous - but be sure to plan where and how they will be used before investing.

7) **Media coverage is the icing, not the cake.**

In order to build credibility, the concept must be embedded in the organization and its purpose. The London journalism and PR market remains highly competitive – be clear on what makes your story unique.

The event was concluded with an interactive Q&A session with the panel, giving Members the opportunity to elaborate on some of their own personal experiences.

The Financial Services Forum would like to thank Compeer and Sales Kinetics for their support of the Private Banking and Wealth Management Special Interest Group.

If you would like to receive a copy of the UBS / PwC Billionaires Report, please get in contact with Aine Bryn at aine.bryn@uk.pwc.com or download using this link: <https://uhnw-greatwealth.ubs.com/en/insights/billionaires-report-2016/>

The Financial Services Forum would like to thank Kirsten Burt for putting the speakers and content for this event together. We would also like to thank UBS Wealth Management for their fantastic hospitality.

The Financial Services Forum

www.thefsforum.co.uk

0207 449 9000