



Custom Media Case Study

The Challenge

Genworth hoped to empower its financial advisors with a tool to get conversations started with their clients. Client meetings had become a chore instead of an opportunity for open conversations, education, and goal-setting. Genworth wanted to provide a simple way to make the process both more efficient and more pleasant.

The Parameters

Genworth management had an open and wide-ranging conversation with key principals at SourceMedia, explaining its capabilities and projects in the pipeline. One was a simple book illustrating a parable: the Genworth story of diversification told through two characters crossing a river. One had a rowboat, one had a sailboat—conditions changed, so neither boat was the right answer *all* the time. The moral? Don't put all your reliance on one boat; don't put all your money in one investment. This seemed like a great first step to create a tool for advisors to get those positive conversations going.

The Process

Though the story was written and simple illustrations had been created by Genworth CMO Mark Schoenbeck, SourceMedia brought to the table a host of new ideas including colorful imagery to illustrate key points and make the book more compelling; publishing solutions to make the book cost-effective; and a number of other suggestions that all provided turnkey support and an easy way to move the entire process forward, smoothly.

The Results

Genworth was very pleased with the reaction from the industry and most important, from its advisors. Trade publications, looking for a “good story” in bad markets, covered how this simple parable made a difference in fostering effective client communication. Advisors have embraced the book; one keeps it in his office waiting room for every new client meeting and starts every conversation with a discussion of what the client thought. Another used key pieces in an advertorial and saw an exponential increase in client inquiries. A third is investigating the possibility of adding a voice-over for an online presentation. The simple story resonated with advisors and clients. To date, over 1,000 books have been used and it is in its second print run.

What They Said

“Working with SourceMedia was a wonderful experience—they had great, creative ideas and made the process smoother than we could have ever expected. Ginny, the project manager, was an excellent central source of all resources and the creative ideas they brought to the table really made the difference in this project's success.”

Mark Schoenbeck, CMO/Director Practice Management

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