

## Content Management for a Client Conference Striking a Balance between Marketing and Education

### Case Study

**An innovative, best-in-class FinTech provider needed a content manager for its annual client conference.**

**Graber Associates consultants recruited a faculty and developed a curriculum that brought high net promoter scores, enlightened attendees, and highlighted the provider's key differentiators.**

### Project Background

A leading U.S.-based provider of online banking services hosts an annual client conference for more than 500 attendees from client and prospect banks and credit unions.

The client conference's primary goal is to highlight the firm's offerings and capabilities. But it must do that without obvious marketing or promotional content. This requires a speaker roster and topic set that demonstrate thought leadership, show the value of innovation, and deliver new and practical knowledge to attendees.

This year's event came at a critical time for the client. The firm had been acquired by a new company just a few months before the conference. Critical modifications soon followed the change in ownership. Senior management turned over almost entirely and a substantial amount of product re-alignment ensued as well.

The task at hand was to create a conference with substantive, worthwhile content that would help the client keep its present customers and attract new ones. The client always needs to demonstrate its full commitment to remaining the leader in its market, but this year that need was especially crucial.

### The Process

Our consultant became an integral part of the client's event management team for seven months, from initial contract signing through post-conference wrap-up and review.

Pre-conference responsibilities included:

- developing the conference theme
- planning the agenda
- championing the approach to management
- choosing keynote and track speakers, and
- managing a social media presence and content contributions

## Our Services

Graber Associates offers a full slate of services and programs that help you reach your important constituencies:

### Public Relations

- Message development
- Press and analyst relations
- News release programs
- Editorial placements
- Media and analyst briefings
- Client/Partner newsletter
- Company backgrounders

### Marketing

- Messaging and positioning
- Trade show planning & support
- Announcement plans and strategy
- Press and analyst tours
- White papers
- Sales guides and slip sheets
- Speakers' bureau services and speechwriting
- Customer/partner newsletters

### Research

- Customer satisfaction surveys
- Cash management analysis
- Market research
- Bank or vendor RFP's
- Marketing plans
- Implementation plans
- Marketplace analysis
- New market perspectives
- Competitive assessments

Throughout the planning and preparation stage, the consultant worked with the speakers to develop and fine-tune presentations and to hone their delivery skills.

At the conference, the consultant conducted speaker walk-throughs and rehearsals, and was on-site to ensure that logistical issues were addressed and the guests left with a positive experience.

The consultant concluded the engagement with a conference recap report and review with the client's management. Attendees' comments and critiques were overwhelmingly positive.

## About Graber Associates LLC

Graber Associates is a boutique public relations, marketing, and research firm founded in 2002. We develop and implement public relations and marketing communications programs that generate revenue for businesses. We provide research that allows our clients to make better decisions. Although we specialize in financial services and technology, our services cover a wide range of vertical markets.

We work hand-in-glove with you to develop public relations initiatives and execute marketing campaigns that are created with years of experience behind them. Your goals, objectives, and budget are integral parts of our working with you. As part of your team, we begin to think as you do and suggest ways to improve the process and achieve collective goals.

## For More Information

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