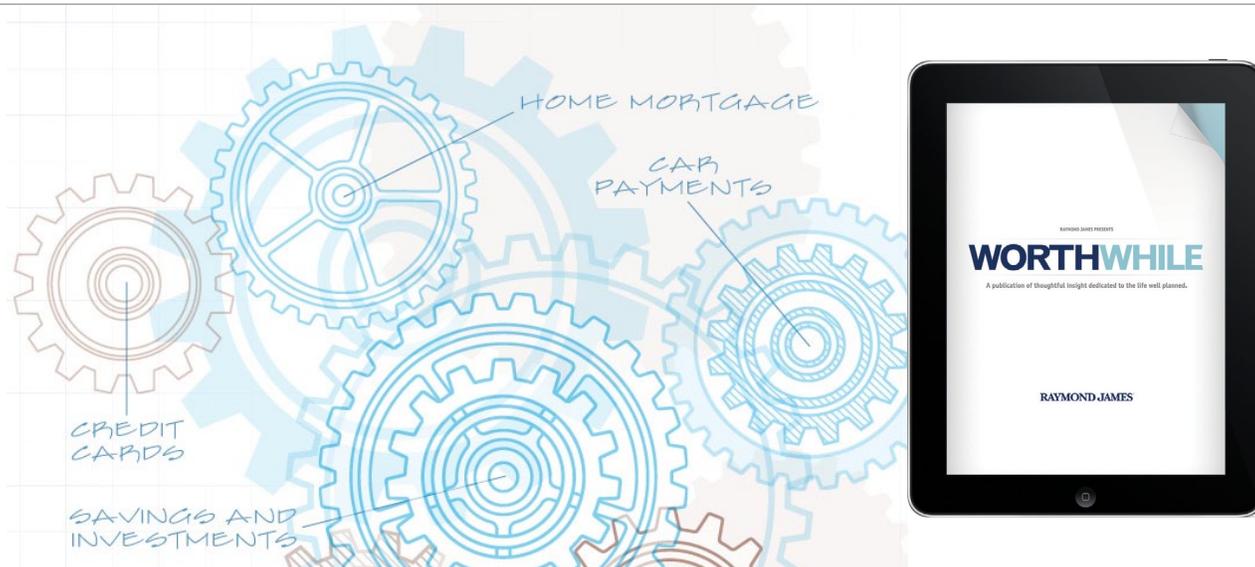




# Raymond James Financial Strengthening client relationships



## RAYMOND JAMES®

Raymond James Financial  
St. Petersburg, Florida  
[www.RaymondJames.com](http://www.RaymondJames.com)

### Results

- Created digital edition of popular publication that financial advisors can personally brand
- Implemented restricted distribution to enable advisors to offer personalized content to clients
- Produced less expensive alternative to print publication using the same high-quality content

Financial advisors use *WorthWhile* digital edition created with Adobe Digital Publishing Suite, Enterprise Edition to engage with high net worth clients and prospects

Raymond James Financial manages more than 2.5 million accounts worth an estimated \$418 billion\*; the majority of which belong to individual investors. More than 6,300 financial advisors, primarily in North America, help guide those clients on how best to save, invest, and grow their money. The most successful advisors communicate regularly with clients, and the ongoing demonstration of personal interest by their advisors is extraordinarily important to clients with high net worth.

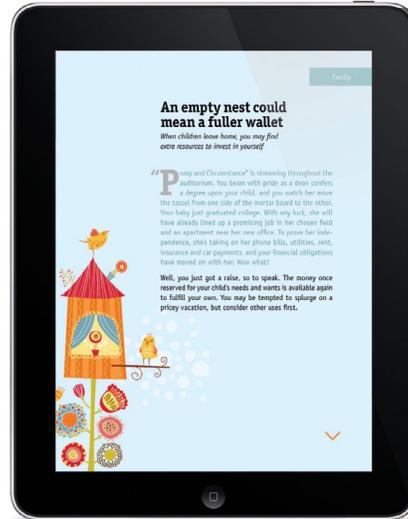
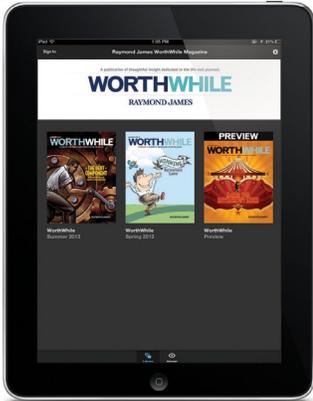
For the last nine years, Raymond James has published *WorthWhile*, an award-winning, high-end quarterly publication targeting high net worth clients and prospects. In 2013, the financial services firm made the decision to supplement the print edition with a digital offering, extending its reach and offering customization opportunities for advisors by using Adobe Digital Publishing Suite, Enterprise Edition.

*WorthWhile* contains valuable investment information, such as market and economic updates, retirement and estate planning advice, and investment strategies. It also includes lifestyle content on topics such as interesting consumer products, art, travel, books, and philanthropy.

Raymond James prints about 70,000 copies each quarter, and approximately 1,500 advisors use them for client contact. Of the roughly 100 communications pieces Raymond James produces for advisors each quarter, *WorthWhile* is consistently the most popular.

\* Source: Raymond James Financial, as of 7/31/2013

The Restricted Distribution capabilities within Adobe Digital Publishing Suite enable investors to gain access to the digital editions and the valuable content they offer using credentials from their advisors.



### Challenge

- Producing a multimedia marketing resource that takes advantage of mobile technologies
- Extending high-quality print publication to a cost-efficient digital platform
- Helping financial advisors provide useful information to clients in an engaging, digital format

### Solution

- Leverage Adobe Digital Publishing Suite to produce digital edition of print publication
- Take advantage of existing print publication resources and Adobe InDesign® workflow to create a dynamic, engaging, interactive digital publication
- Use Restricted Distribution in Adobe Digital Publishing Suite to customize digital edition for advisors

### Systems at a glance

Adobe Digital Publishing Suite,  
Enterprise Edition  
Adobe InDesign

### Extending the reach of *WorthWhile*

In 2013, Raymond James began producing a digital edition of *WorthWhile*, produced using Adobe Digital Publishing Suite. The digital edition accomplishes several goals for Raymond James, such as expanding the reach of the publication and enabling digital distribution of engaging, interactive content. The *WorthWhile* digital edition can be used as a complement to the printed publication, or as a less expensive alternative for advisors who want to customize and send the publication to a larger number of clients.

"The print publication is a high-end, tangible piece, but everyone receives the same printed piece," says Cameron Diehl, manager of advisor productivity and marketing strategy at Raymond James. "Using Adobe Digital Publishing Suite, financial advisors can custom-brand the *WorthWhile* digital edition by inserting a banner with their logo and contact information."

This custom branding is possible using the Restricted Distribution capabilities within Adobe Digital Publishing Suite. Restricted Distribution allows users access to content based on their credentials. At Raymond James, when an advisor subscribes to the *WorthWhile* digital edition, he or she receives a unique ID. Advisors share that ID with clients, who enter the code to download the digital publication. The ID tells the app which assets to load into the library, such as the advisor's banner and contact information.

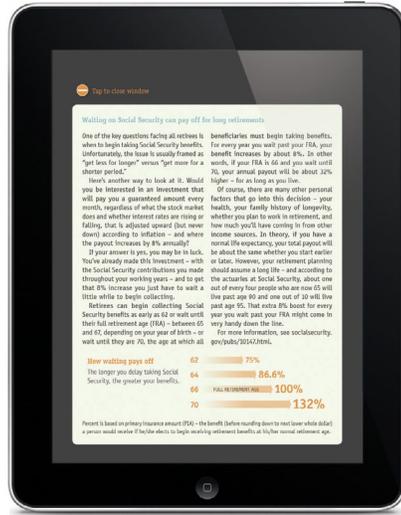
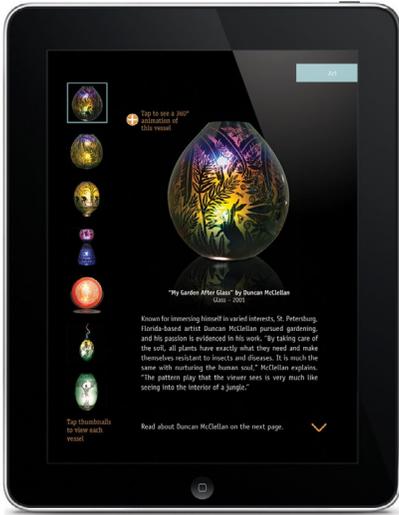
"The digital edition brings financial advisors and clients closer together," says Diehl. "It keeps advisors' names in front of their contacts who can then email the advisor or go to their website directly from within the *WorthWhile* app."

Such immediate contact is also expected to shorten the sales cycle, compared with mailing the print publication and following up. Using analytics built into Adobe Digital Publishing Suite, Raymond James is already measuring traffic and what interactive features resonate with clients. Initial, high-level results have been positive and the company will continue to evaluate results going forward.

### New technology and existing workflows

The digital edition's engaging content, which includes embedded videos, timelines, slideshows, and animations, are only part of its appeal to Raymond James. It also supports the company's strategic move to enable advisors to practice at any time in any place.

"Our industry is a relationship business," says Diehl. "Staying in touch and providing useful information is important. Offering a digital edition of *WorthWhile* produced with Adobe Digital Publishing Suite helps our financial advisors to reach more clients in more ways. More media is being consumed on smartphones and tablets, and we need to give our advisors ways to use those channels while remaining compliant with financial regulations."



*"Downloading and using the Adobe Digital Publishing Suite tools available on Adobe's website was a huge plus for me."*

Elaine Gibson, graphic designer,  
Raymond James

The financial services industry is highly regulated, and Adobe Digital Publishing Suite supports compliance by allowing centralized control of content when it's being produced. Adobe Digital Publishing Suite integrates smoothly with the Adobe solutions Raymond James already uses to publish the print version of *WorthWhile*. Workflows for regulatory review and approval of the print publication are well established, and the company has been able to create seamless workflows that enable simultaneous production of the digital edition.

"The same print production designers who use Adobe InDesign to create the print edition can produce the digital edition of *WorthWhile* using Adobe Digital Publishing Suite," says Diehl.

"Downloading and using the Adobe Digital Publishing Suite tools available on Adobe's website was a huge plus for me," stated Elaine Gibson, a graphic designer in the Raymond James marketing department. "The tools work seamlessly within Adobe InDesign and use familiar terms and interfaces, which flattened the learning curve considerably."

Raymond James spent three months testing the digital edition before releasing it publicly. During that time, the company has refined its process. In fact, the creators of *WorthWhile* are talking about interactive options earlier in the process so proper plans can be made to acquire necessary elements such as audio and video for the digital edition.

### Preparing for broader use

Raymond James is currently in the process of introducing the *WorthWhile* digital edition to its advisors. Advisors who have signed up to receive the digital edition cite the design, functionality, and personal branding capabilities among their favorite aspects.

"I think it is a great addition," stated Raymond James financial advisor Evan Shear, CFP® of the CrosslyShear Group. "We will certainly promote it on social media to our friends as well as blast emails that they can download it. I love that it will be personalized to our practice and website."

For advisors who do not have tablets, Raymond James is planning to use the web viewing capabilities in Adobe Digital Publishing Suite to allow access to articles and content from within their desktop browser. The company also plans to use email social sharing capabilities to promote more one-to-one sharing of articles from within the digital edition.

"Advisors are always looking to add to their arsenal of tools to facilitate client relationships," says Diehl. "Adobe Digital Publishing Suite gives us a solid foundation for expanding the reach of a resource that is already highly valued by our advisors and their clients."

For more information  
[www.adobe.com/products/  
digital-publishing-suite-family](http://www.adobe.com/products/digital-publishing-suite-family)



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