Case Study: Building Scalable Advisor Training Programs

The Challenge: A national broker-dealer wanted to train its financial advisors on nine complex, high-value client niches.

The Current State

Goal:

Give advisors the market knowledge, scripts, and prospecting strategies to win in niche, high-value client segments through a single agreement.

Modules Delivered: 9

Audience: Financial Advisors, Firm-Wide

Timeline: 4–5 Months, Concept to Launch

Delivery: Program Booklet + FLX Media Avatar Video

Our Solution: The firm adopted the Business Accelerator (BA) to build its advisor education curriculum.

Researched, curated, and designed every module end to end.

No internal resources required and ability to get to the market timely through a single agreement.

Combined written content with high-quality scalable video support.

The FLX Advantage

Cost Savings

135 – 270 Hrs

- 9 full programs built in a fraction of the time and cost of an internal L&D team.
- One engagement, zero vendor-sourcing cycle: strategy, writing, design, and video production under one roof.

Growth Potential

9 Scalable Programs

- Thousands of advisors equipped to build deeper client relationships across the highest-value markets from NIL athletes to farmers & ranchers.
- Positions advisors as credible specialists in markets most firms never train for.

Productivity

1 Contract

- One team of professional development experts handled origination, production, design, and video - start to finish all through one single contract.
- A repeatable framework - new client segments can be added without rebuilding from scratch.

FLX NETWORKS

Contact us: