Case Study: The Business Accelerator (BA) Advantage: *Turnkey Events That Build Relationships Beyond Product*

The Challenge:

An FLX member firm with an existing platform relationship wanted to differentiate itself beyond its portfolio. The goal was to convert that access into brand equity with the operations leaders who shape the client experience, deepening relationships in a top-producing broker-dealer complex.

The Current State

Goal: Support an FLX member firm in broadening its existing relationship with branch offices, through a turnkey engagement that puts the member firm and product suite in front of every operations leader in the complex in a differentiated model.

Sponsor AUM: $1.1B+

Audience: 70 Ops Leaders, Raymond James

Format: Asset Manager Sponsored BA Content (BA full-day offsite)

FBA Coach: Megan Spivey, ICF certified executive coach & Fair Play facilitator.

Our Solution:

BA, a curated marketplace of expert coaches and value add programming, provides a tangible differentiator for member firms. FLX managed execution end to end, turning approved content into a turnkey event that created a new opportunity to connect beyond typical product conversations.



BA aggregates executive coaches and facilitators along with a menu of value-add programs through a unified, vetted network.



Contracting, billing, and oversight consolidated under one FLX agreement, replacing 3 separate vendor relationships.



Logistics managed end-to-end, positioning the sponsor's brand directly in front of every operations leader & support staff in the complex.

The FLX Advantage

Cost Savings

- Layered onto an existing FLX relationship, avoiding $150K–$190K/yr in national-accounts compensation to build that access independently.
- Avoids $25K–$40K in standalone event costs, up to 75% above the BA rate.
- Accelerates the typical 6–10 week vendor-sourcing cycle for coach vetting and billing & compliance setup.

Growth Potential

- Broad, tangible reach: 70 operations personnel attended.
- Positioned the member firm as a trusted partner to the associates closest to the client relationship.
- Delivered inside a complex sustaining strong growth and minimal attrition, the member firm's target audience for visibility.

Productivity

- Zero internal lift: FLX handled sourcing, content, and logistics start to finish.
- Engaged the audience with relevant content & actionable takeaways while elevating the member firm beyond traditional product focused messaging.
- No rebuild required for the next event at the complex (repeatable framework).

FLX NETWORKS

Contact us: