

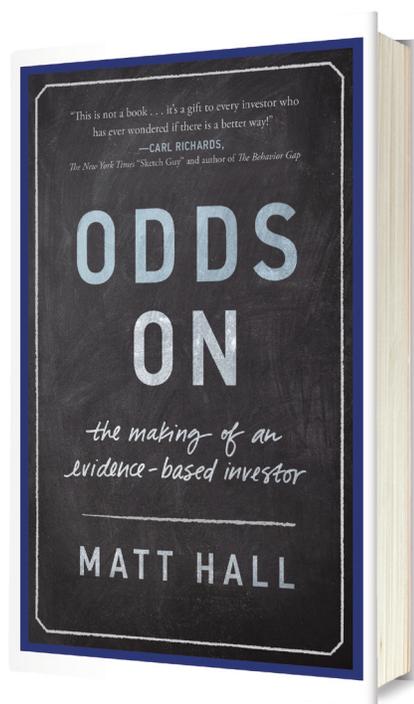
CASE STUDY: *Financial Expert Turned Author*

DISCOVERING MARKET OPPORTUNITY THROUGH BRAND DEVELOPMENT

Challenge

Prior to publishing his book, *Odds On: The Makings of an Evidence-Based Investor*, Matt Hall found strong professional success as the co-founder and president of the investment management firm Hill Investment Group. He was motivated to kick his business into high gear and share his expertise widely to help change the way people think about investing. To achieve this, he set out to write a new kind of investment book: one that was both engaging and interesting—a rare combination in the investment book category.

As *Odds On* was Matt's debut book, his name was not prominent in the business or investment book market. He wanted to develop a brand that would allow him to raise his credibility, connect with investors, and grow his investment business. Instead of attempting to make sense of this complicated challenge himself, he sought out the advice of the experts at Greenleaf Book Group.



Discovering Brand Potential

Matt partnered with Greenleaf for *Odds On* in 2015 and immediately began collaborating with his dedicated brand strategist, who conducted in-depth research on Matt's competitive landscape. Matt knew his content and goals well, but he was too close to his business to see the bigger picture and discover the opportunities available beyond publishing his book.

To formulate Matt's brand positioning, his Greenleaf brand strategist researched Matt's peers and competitors in the investment book space, pinpointed his unique offerings and viewpoints, and determined how to strategically position him in the market for success. The end result was eye-opening for Matt and completely exceeded his expectations.

Through the brand strategy process, Matt discovered his market potential and realized that his message could be more impactful than he had ever imagined.

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“ I was so inspired after the presentation that I held a meeting in my office and went through what the brand strategist shared in the brand strategy presentation. I have had many consultants and marketing/branding people in and around my business, but no one ever nailed it as clearly as the brand strategist did.”

The strategy detailed the work necessary to build his platform and reach his target demographic. To tackle this work, he selected the person who knew him and his brand in-depth—his Greenleaf brand strategist.

From Strategy to Success

Matt's brand strategist began building his platform by using a multichannel approach to shape a robust brand intended to both market the book and engage his audience. The strategy included recommendations for building a social media presence, developing a content strategy for his blog, and creating resources to increase his speaking opportunities. Through this approach, Matt was able to ensure his branding was cohesive and consistent. Whether visiting his online channels, hearing Matt speak at an event, or reading his book, his audience is always presented with content that is relevant and on-brand.

Since publication, the branding and book have been well received by readers and industry professionals alike.

Hill Investment Group has received weekly calls from prospective clients who learned of Matt through *Odds On*. These clients also match the target profiles that his strategist outlined early on

“ The brand strategy gave me a much clearer context for where my book/story fits. The last three slides blew me away—[the] strategy, positioning, and messaging were so on point it was scary (good).”

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in his brand development, further underscoring the value of defining a brand and marketing it to the right people.

Odds On has created a new client pipeline through which Matt can grow his business while also finding success in the retail market.

SUCSESSES INCLUDE:

- *Odds On* placed on the Amazon and 800-CEO-READ best-seller lists
- *Odds On* earned the #1 spot on the best-seller list of the industry blog, *Abnormal Returns*
- Matt developed a Twitter presence and built a following from zero to hundreds
- Months after publication, *Odds On* continues to perform in retail week after week

The work that Matt and his brand strategist accomplished built a foundation for long-term opportunity beyond the publication of *Odds On*.

“We’re now beyond my dreams for what the book would do.”

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Matt Hall is the co-founder and president of the investment management firm Hill Investment Group.

Matt dedicates his professional time to helping investors put the odds of long-term success in their favor by combining a long-term plan, evidence-based investment tools, and behavior management. In addition, Matt has led training for other top wealth managers, created new evidence-based mutual funds, and started an online group of like-minded advisors from around the world. *Odds On* is his first book.

Matt lives in St. Louis, Missouri, with his wife, Lisa, and their daughter, Harper.

Greenleaf Book Group is a publisher and distributor best known for its innovative business model, distribution power, and award-winning designs. Named one of Inc. magazine’s 500 fastest growing companies in the United States, they have represented more than 1,000 titles, including over 30 that hit the *New York Times*, *Wall Street Journal*, and *USA Today* bestseller lists.