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CASE STUDY

# FINANCE

## **QUICK HITS**

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# QUICK HITS: Summary

## PROBLEMS

- Too high of a cost per conversion (up to \$750)
- Comprehensive marketing strategy lacking
- Negative ROI because of siloed and reactionary strategies
- High competition in the market and struggled with brand influence

## SOLUTIONS

- Defined buyer personas and tracked digital journeys
- Built a unified digital experience across multiple platforms
- Put analytics at the heart of strategic planning
- Integrated marketing initiatives with sales
- Captained all marketing initiatives including digital, traditional, event, and PR
- Completed a full re-branding

## SUCCESS

- Online conversion rates increased by 130%
- Traditional conversion rates increased by 86%
- Sales close rates went from 60% to 93% within the first year
- Revenue increased by 600% in the second year



# INTRODUCTION

## FINANCE

The financial and insurance industry represents 7.5%, or \$1.45 trillion, of the United States' gross domestic product. Through 2026, this sector is anticipated to grow 11%, which outpaces the average growth projected for all industries.

For those working in financial services, whether it be mergers and acquisitions, business valuation, taxation, or investment, the growth of this sector means an increased amount of competition.

In a field that deals in intangibles, how do businesses stand out? How do business owners and leaders capture the correct audiences and prove their value when there's a veritable wealth of information readily available online?

**Without a comprehensive marketing strategy,** any dollars they were spending in pay per click or other ads failed to resonate with their overall goals.

With the right marketing, answering these questions is simple - and it can take businesses in the financial industry from eking along to excelling. Read how we helped one business go above and beyond their growth goals.

## CHAPTER 1

### PROBLEMS

For one client, their issues stemmed largely from a large amount of competition in their industry. With so many options for consumers in a recovering economy, it was difficult to stand out and prove their value.

They allocated the lion's share of their marketing dollars to a pay-per-

click campaign in an effort to boost their rankings and appear above other financial services providers. However, because their strategy relied heavily on their own assumptions about SEO and proper search terms, their cost per conversion, a measure of how much it cost them to obtain one client, was a sky-high \$750.

Without a comprehensive marketing strategy, any dollars they were spending in pay per click or other ads failed to resonate with their overall goals. They may have succeeded in bringing a few visitors into the fold, but because their social media, website, and overall branding followed no guidelines, they often lost these opportunities before they were fully formed.

Businesses can attribute a **23% boost in revenue** from presenting their brand consistently.

Businesses like our client's rely so heavily on making a personal connection with their own clients. Their difficulty lay in capturing the correct audiences and forging these personal connections.

When they reached out to us, they were exasperated: how were they to move away from siloed, reactionary marketing initiatives and reduce their cost per conversion if they were too busy spinning their wheels just to keep up with their current strategies?

## **C H A P T E R 2**

### **STRATEGY**

It all started with the brand. Studies have shown the importance of branding time and again - businesses can attribute a 23% boost in revenue from presenting their brand consistently. Given that consumers need, on average, between 5 and 7 interactions with a brand to remember it, maintaining a consistent brand is of the utmost importance.

With this in mind, we overhauled their existing brand and recreated one that would make an impact on their growth goals. Every piece of their business, from logo to website to social platforms to email signature, was rebranded to act as part of an overall branding strategy. The goal was to create a unified digital experience across any platform or medium a potential customer could interact with.

Additionally, we helped extend this brand identity to all marketing initiatives, including festivals, events, PR, and more.

**By working hand-in-hand with sales, marketing was able to add its full potential value to growth goals.**

Rather than reacting to the market, the season, or a sudden need for more customers, this business needed a marketing strategy with numbers and analytics at its core. By identifying key indicators such as when their desired audience was online, what platforms they used, the messaging they reacted to positively, and conversion points that actually worked, we helped craft a solid-base strategy built for growth.

One of their most profound issues lay in targeting the correct audiences for their services. To that end, we developed buyer personas for them and helped bridge the gap between visitor becoming customer.

By targeting specific personas, this company was able to correctly anticipate customers' needs and determine from the get-go if a client was a good fit or not. And by introducing a method of tracking digital journeys, we were able to help the client discover what was resonating with their target audience and what was not.

With sales and marketing working in alignment, close rates went from **60% to 93% within the first year.**

Lastly, we helped integrate their sales and marketing initiatives. By working hand-in-hand with sales, marketing was able to add its full potential value to growth goals. It was not enough to toss potential customers at sales teams without any context. With a marketing strategy based on the principles of the inbound methodology, sales teams were given verifiable and legitimate leads, leading to more closes and less time wasted on poorly vetted leads.

## **C H A P T E R 3**

### **SUCCESS**

#### **Online conversion rates increased 130% in the first year.**

Once the client had an integrated marketing strategy working in tandem with sales and marketing alignment, they saw quick and profound results.

Owing to placing and developing content in context of the buyer's journey, online conversion rates increased 130% in the first year.

Traditional conversion rates increased by 86%.

With sales and marketing working in alignment, close rates went from 60% to 93% within the first year.

And when we say marketing will boost your bottom line, we mean it: this client's revenue increased 600% after two years of working with us.

This client's success stands not as an exception but as a natural result of committing to inbound marketing. By sticking to an overall strategy, integrating sales and marketing efforts, and developing a cohesive brand, this particular customer has seen continued success.



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We are **innovative thinkers**  
and **boundary-pushers.**

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