

# CASE STUDIES



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## UNBIASED WEALTH MANAGEMENT LTD.

**Description:** A private Fee Only Net Worth Advisory Service based in Calgary, AB.

**Audience:** High net worth individuals and their trusted advisors

### The Situation:

A private wealth management company with a very unique and comprehensive service model, contrary to the industry norms decided to expand. The client needed to build profile and attract qualified sales leads and potential staff.

### The Challenge:

The firm had developed business on a referrals and direct sales basis and had no marketing materials. Their service model was new and contrary to the practices of the majority of the industry. As a result, we needed to explicitly define what the services were and present a compelling argument for the contrary approach. The client also had limited production capacity, so the sales and marketing program had to be scaled appropriately as to not overwhelm operations. In addition, there was an elite target market of very high net worth people, representing less than 1% of the population. The sales and marketing efforts needed to be highly targeted.

### The Approach:

Design and implement a complete sales lead generation and marketing communications program. Given the niche target audience and the limited production capacity, the program focused on a mix of search marketing, social networking, professional referrals development, direct mail and public relations. All program components can be turned on, scaled up and down as capacity allows in real-time.

### The Results:

The results have been beneficial both in the short term, as well as leading to long term success. The client is able to articulate their value proposition and target audience simply and easily. Generating both qualified sales leads, professional referrals and prospective job applicants to help grow their internal production capacity. All while greatly decreasing the average sales cycle times and increasing sales closure ratios.



**TYPE:** Inbound Sales Lead Generation

**INDUSTRY:** Financial Services

**GOAL:** Full Program Rollout

**ROLE:** Fractional Director of Marketing



Website Home Page

## PROGRAM DELIVERABLES

### Design:

- Define the brand
- Develop the corporate identity
- Define the sales economics and success criteria
- Develop the creative brief and marketing plan
- Develop key sales messages and campaignable idea
- Competitive review and keyword research

### Build:

- Develop the website & integrate with the CRM
- Whitepaper co-authorship
- Develop an introduction video
- Develop series of sales landing pages
- Develop an on-line seminar

### Grow:

- Develop a blog
- Develop social media profiles
- Search engine optimization and link development
- Banner ad development and campaign optimization
- Campaign management of search engine and portal advertising
- Performance tracking and analytics
- On-going support and performance optimization



### TECHNOLOGIES EMPLOYED



## CASE STUDY ONE IMAGE GALLERY



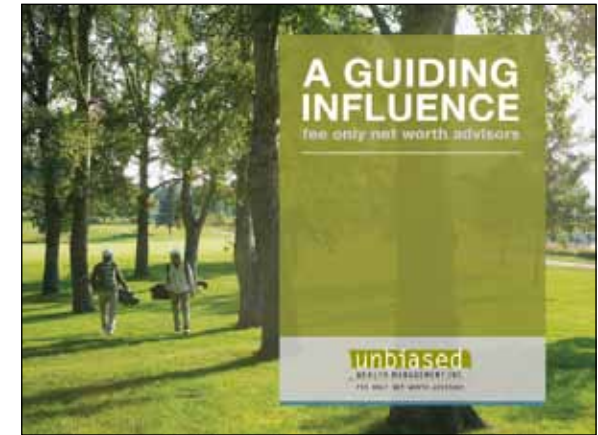
Blog Development



Introduction Video



Whitepage Development



Presentation Template



Twitter Profile